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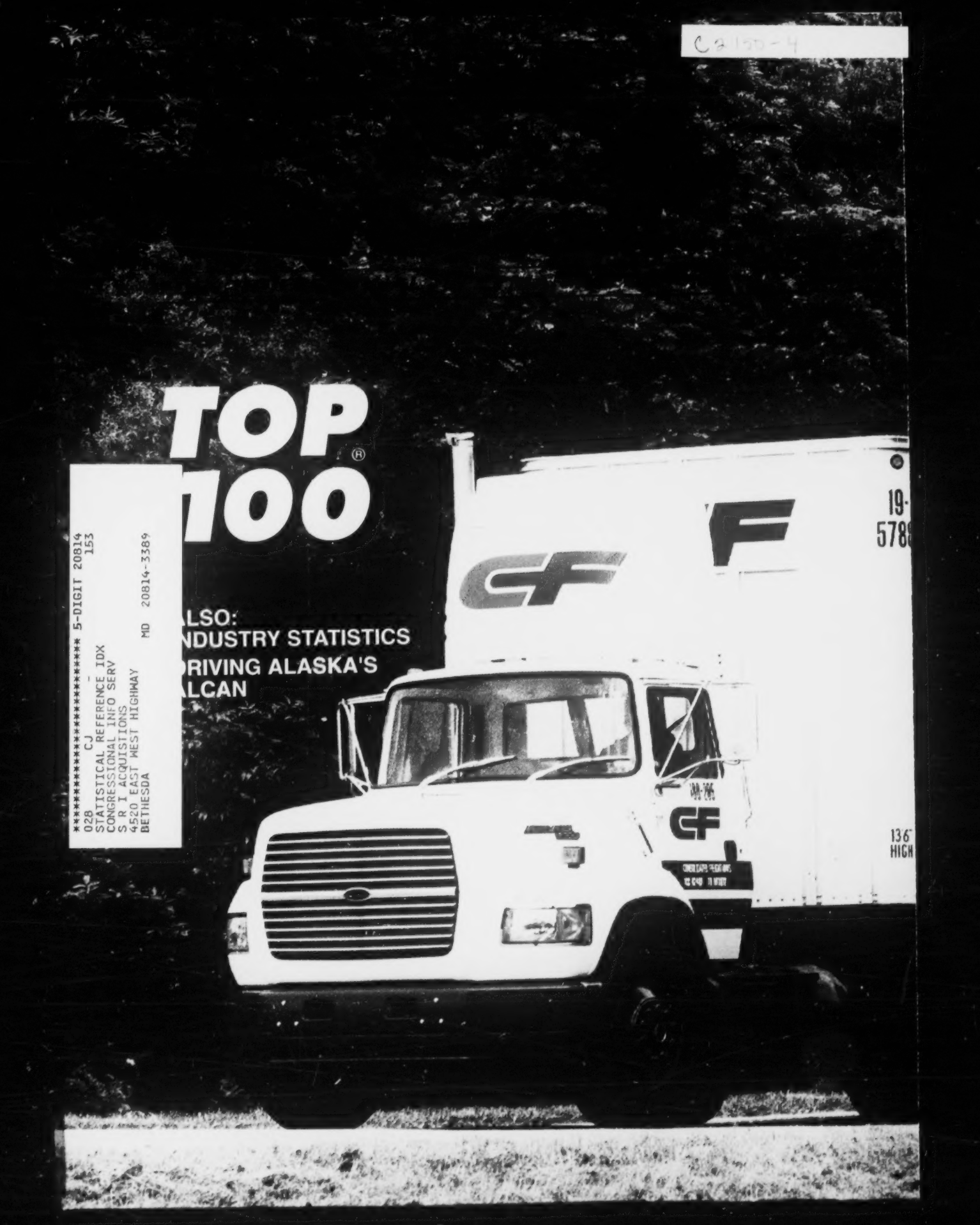

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CCJ

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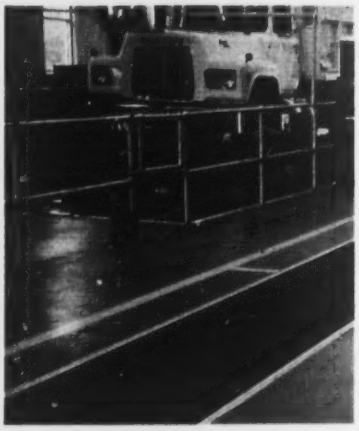

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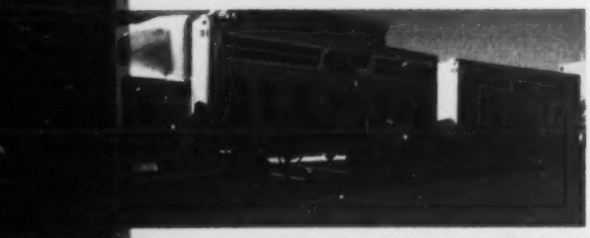

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55 TOP 100
The leading for-hire fleets' 1991 financial performance may lend credence to the adage: "no pain, no gain." That's because, as a group, the Top 100 carriers increased their aggregate post-tax income by 4% in a recessionary economy.

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There was no cause to celebrate 1991 equipment sales. And while most suppliers experienced buoyant second quarter sales this year, few have the confidence to revise upward their conservative business plans for 1992.

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IN THE NEXT ISSUE

CCJ will try to clarify a confusingly revised federal rule–effective in October–on trailer air brakes.

The revision allows air for spring brakes to be taken directly from a tractor's supply line, not its dedicated air reservoir.

Some fear that safety will suffer because it will be legal to spec trailer air brake plumbing that permits unlimited operation with a leaky system. This story, by Sr. Technical Editor, Rich Cross, entitled, "What NHTSA's New Brake Rule Means To You," offers rule interpretations and spec'ing options. Cross uses diagrams to explain how suppliers have revised trailer air brake system plumbing schemes to compensate for the elimination of the second air reservoir. ❑

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COMMERCIAL CARRIER JOURNAL (ISSN 1062-0060), one of the publications owned by CHILTON COMPANY, is published monthly at 1 Chilton Way, Radnor, Pa. 19089. Chilton Company is a division of American Broadcasting Companies, Inc., New York, N.Y. Subscription price: United States and its possessions, $45.00 a year; single copies are $5.00 a copy with the exception of special issues (April, July and October) which are $10.00 each. Canada and all other countries, $75.00 a year, payable in advance. Second Class Postage paid at Wayne, Pa. 19089 and additional mailing offices. Postmaster: Send form 3579 to Commercial Carrier Journal, Box 2045, Radnor, Pa. 19089.

Canadian GST Registration Number: R125906743

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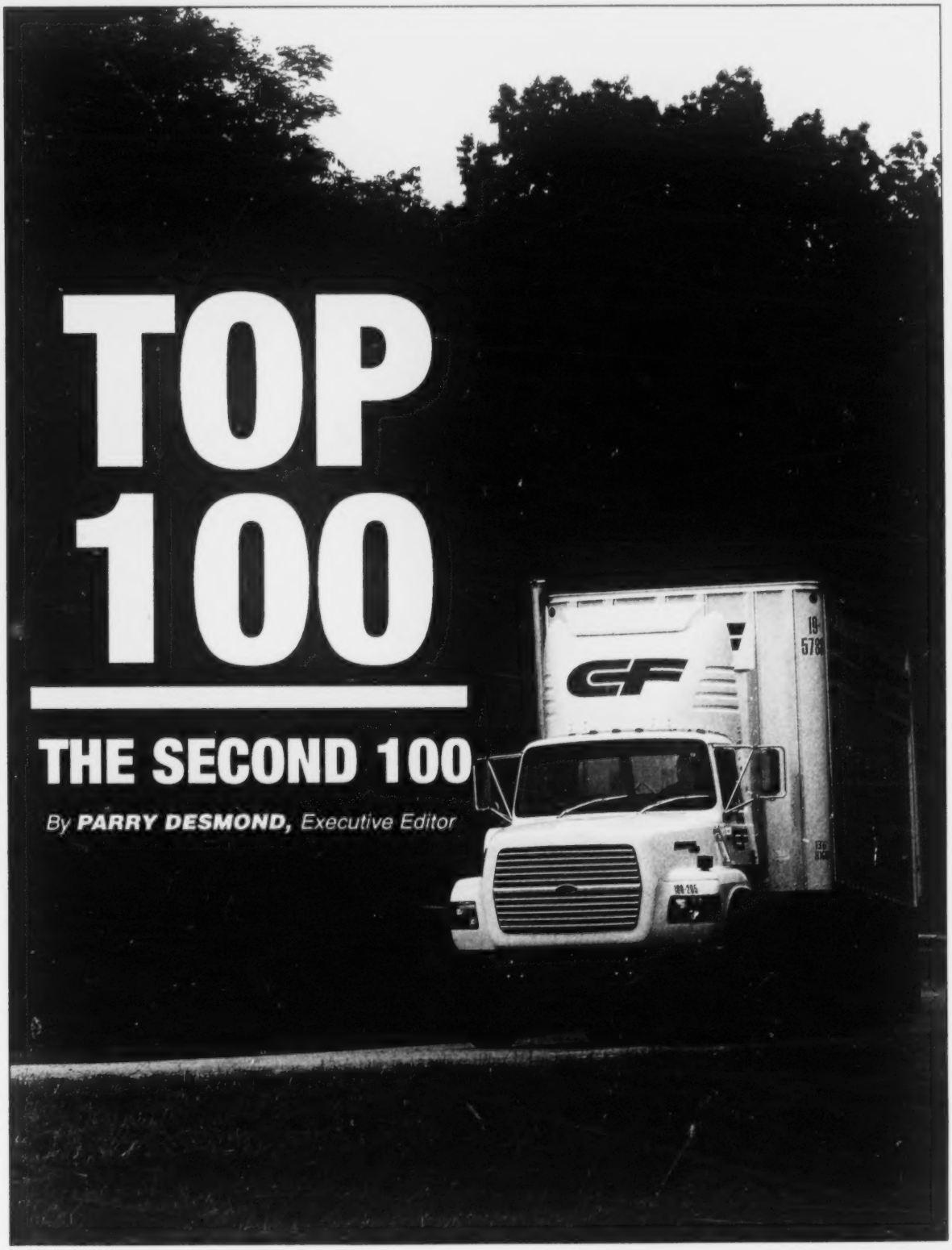
TOP 100

THE SECOND 100

By **PARRY DESMOND,** *Executive Editor*



TOP 100 fleets found recipe for survival

Although they had to cope with some bitter ingredients from the 1991 U.S. economy, many of the nation's leading for-hire carriers knew how to handle the heat.

Just as it takes more than flour to bake a cake, strong revenues aren't the sole ingredient in the rankings of the nation's *Top 100* for-hire carriers.

That's because the *Top 100* fleets' rankings also were affected by many bitter ingredients from the 1991 U.S. economy.

They include:

- industrial production, down 1.9%;
- 200,000 fewer housing starts–one reason why the *Top 100's* household goods carriers' operating ratio (OR) averaged 98.6 and their net profit margin was 0.27%;
- 1.1 million fewer cars sold, resulting in *Top 100* car carriers having an average 100.3 OR for the second straight year and a -1.28% net loss in 1991;
- a 6.7% unemployment rate;
- a $201.2 billion increase in the federal deficit;
- pre-tax corporate profits off by $22.9 billion.

Those bitter ingredients were partially neutralized by the following sweeteners:

- Although surcharges didn't cover surging fuel prices in the first quarter of 1991, the per-barrel price U.S. refiners paid overall for

Continued

Fleets whose annual revenues improved the most

Fleet, City, State	Revenue Percent Change
Missouri Nebraska Express (MNX), St. Joseph, Mo.	45.1%
Direct Transit, North Sioux City, S.D.	44.4%
Arkansas Freightways, Harrison, Ark.	38.8%
U.S. Xpress, Chattanooga, Tenn.	35.0%
J.B. Hunt Transport, Lowell, Ark.	26.2%
C.R. England & Sons, Salt Lake City Ut.	25.7%
M.S. Carriers, Memphis, Tenn.	23.5%
Swift Transportation, Phoenix, Ariz.	21.8%
Ryder Distribution Resources, Miami, Fla.	20.5%
New Prime, Springfield, Mo.	20.4%
Schneider National Carriers, Green Bay, Wisc.	20.1%
Heartland Express, Coralville, Ia.	17.5%
Stevens Transport, Mesquite, Tex.	17.2%
Contract Freighters Inc., Joplin, Mo.	16.8%
Crete Carrier Corp., Lincoln, Neb.	16.1%

Carriers with for-hire authority

Year	Class I (Over $5 million)	Class II ($1-$5 million)	Class III (Under $1 million)	Total
1991	863	1,148	44,174	46,185
1990	870	1,169	42,109	44,414
1987	856	1,266	35,505	38,338
1984	1,088	1,554	27,370	30,481
1981	1,031	2,293	18,563	22,270

Less-Than-Truckload Common Carriers of General Freight

Fleet Name, City & State	Gross Revenues	Total Operating Expenses	Net Operating Income	Interest Expense	Net Income	Operating Ratio	Profit Margin %	Salaries Wages & Fringes
LTL GENERAL FREIGHT COMMON CARRIERS								
AAA COOPER TRANSPORTATION, DOTHAN, AL	$166,887	$152,064	$14,823	$5,970	$7,573	91.1	4.54	$97,860
ABF FREIGHT SYSTEM, INC., FORT SMITH, AR	783,024	754,125	28,899	7,675	(2,949)	96.3	-0.38	515,941
A-P-A TRANSPORT CORP., NORTH BERGEN, NJ	138,043	130,279	7,764	2,899	5,945	94.4	4.31	87,451
ADVANCE TRANSPORTATION CO., MILWAUKEE, WI	119,980	117,682	2,299	2,092	110	98.1	0.09	73,748
ANR FREIGHT SYSTEM, INC., DENVER, CO	123,442	154,712	(31,270)	1,107	(25,152)	125.3	-20.38	95,933
ARKANSAS FREIGHTWAYS CORP., HARRISON, AR	198,465	184,015	14,449	2,631	7,870	92.7	3.97	94,312
AVERITT EXPRESS, INC., COOKEVILLE, TN	164,006	153,131	10,876	2,323	5,214	93.4	3.18	82,094
CAROLINA FREIGHT CARRIERS, CHERRYVILLE, NC	583,592	575,643	7,949	3,721	650	98.6	0.11	395,199
CENTRAL FREIGHT LINES, INC., WACO, TX	219,422	214,007	5,416	2,168	2,072	97.5	0.94	150,688
CENTRAL TRANSPORT, INC., WARREN, MI	302,328	297,608	4,721	2,886	6,727	98.4	2.23	53,766
CHURCHILL TRUCK LINES, INC., CHILLICOTHE, MO	164,994	166,065	(1,071)	299	(475)	100.6	-0.29	103,227
CON-WAY TRANSPORTATION SVCS., PORTLAND, OR	534,496	493,838	40,658	3,135	22,469	92.4	4.20	320,356
CONSOLIDATED FREIGHTWAYS CORP., PORTLAND, OR	2,045,250	1,998,964	46,286	15,849	19,534	97.7	0.96	1,342,150
ESTES EXPRESS LINES, RICHMOND, VA	111,477	97,496	13,982	206	8,067	87.5	7.24	67,090
G.I. TRUCKING COMPANY, LA MIRADA, CA	103,334	100,570	2,764	2,265	127	97.3	0.12	45,220
HYMAN FREIGHTWAYS, INC., ST. PAUL, MN	104,260	103,233	1,027	635	218	99.0	0.21	52,873
MERCHANTS FAST MOTOR LINES, ABILENE, TX	105,286	104,501	785	29	(29)	99.3	-0.03	62,539
NEW PENN MOTOR EXPRESS, INC., LEBANON, PA	129,618	103,337	26,281	585	20,543	79.7	15.85	72,440
NORTHWEST TRPT. SERVICE, COMMERCE CITY, CO	258,844	245,711	13,133	18	6,233	94.9	2.41	155,707
OLD DOMINION FREIGHT LINES, HIGH POINT, NC	155,864	142,561	13,303	2,971	163	91.5	0.10	74,404
OVERNITE TRANSPORTATION CO., RICHMOND, VA	799,769	759,816	39,953	96	33,531	95.0	4.19	479,829
PRESTON TRUCKING COMPANY, INC., PRESTON, MD	414,138	417,345	(3,207)	6,408	(5,954)	100.8	-1.44	290,639
ROADWAY EXPRESS, INC., AKRON, OH	2,041,314	1,942,679	98,635	2,833	64,319	95.2	3.15	1,339,699
SAIA MOTOR FREIGHT LINE, INC., HOUMA, LA	109,402	97,482	11,920	3,476	4,689	89.1	4.29	55,489
ST. JOHNSBURY TRUCKING CO., HOLLISTON, MA	304,721	306,250	(1,529)	5,316	(6,581)	100.5	-2.16	221,014
SOUTHEASTERN FREIGHT LINES, COLUMBIA, SC	158,927	146,737	12,190	552	11,700	92.3	7.36	95,250
SPARTAN EXPRESS, INC., GREER, SC	89,488	95,725	(6,237)	2,050	(5,504)	107.0	-6.15	47,293
TNT HOLLAND MOTOR EXPRESS, HOLLAND, MI	283,459	258,043	25,417	0	15,221	91.0	5.37	184,392
TNT RED STAR EXPRESS, INC., AUBURN, NY	170,563	170,682	(119)	219	(283)	100.1	-0.17	123,902
TRANSUS, INC., ATLANTA, GA	81,208	82,600	(1,392)	0	(963)	101.7	-1.19	40,735
UNITED PARCEL SERVICE, INC. (OH), ATLANTA, GA	8,524,001	7,915,534	608,467	192	407,277	92.9	4.78	5,490,067
UNITED PARCEL SERVICE, INC. (NY), ATLANTA, GA	3,198,740	3,103,164	95,577	184	58,245	97.0	1.82	2,168,898
VIKING FREIGHT SYSTEM, INC., SAN JOSE, CA	233,754	219,120	14,634	1,819	8,388	93.7	3.59	145,254
WATKINS MOTOR LINES, INC., LAKELAND, FL	267,445	252,226	15,219	410	6,202	94.3	2.32	110,697
WILLIG FREIGHT LINES, SAN FRANCISCO, CA	75,189	75,124	65	2,548	(1,804)	99.9	-2.40	51,238
YELLOW FREIGHT SYSTEM, OVERLAND PARK, KS	2,323,268	2,298,364	24,904	9,839	8,804	98.9	0.38	1,580,568
TOTAL: LTL GENERAL FREIGHT	$25,587,998	$24,430,433	$1,157,571	$95,406	$682,197	95.5	2.67	$16,367,962

(all dollar amounts in thousands)

Fuel, Oil & Lubricants	Parts, Tires Maintenance & Other	General Supplies & Expenses	Operating Taxes & Licenses	Insurance Expenses	Communication & Utilities	Depreciation & Asset Disposition	Vehicle Rents/Purch Transport.	Equipment Operated			
								Trucks Owned	Tractors Owned	Trailers Operated	Leased Vehicles
$7,468	$9,005	$8,031	$5,736	$3,694	$2,743	$11,251	$6,276	65	881	1,907	75
35,180	31,282	61,370	31,091	16,041	11,889	33,165	18,166	102	3,528	12,866	225
3,868	6,799	13,376	3,302	4,076	3,341	6,713	1,353	369	527	1,535	0
4,555	6,776	5,875	4,453	3,535	1,413	2,883	14,444	12	463	1,549	245
6,180	6,415	14,243	5,539	3,307	3,891	3,401	15,803	10	660	3,098	202
8,110	3,974	39,456	6,526	7,010	3,484	13,790	7,053	41	1,294	3,871	299
12,587	5,646	16,141	3,407	2,722	3,091	9,554	17,889	57	287	2,301	594
19,425	26,336	24,751	18,997	14,148	8,253	30,986	37,548	92	3,121	9,971	0
9,196	11,199	10,737	9,484	5,435	3,157	11,914	2,197	512	1,672	4,199	0
0	1,403	10,745	1,789	5,442	1,883	973	221,607	0	0	0	730
7,355	12,389	6,617	6,176	3,543	2,415	5,055	19,288	24	999	2,341	0
19,793	23,063	48,091	21,159	15,618	11,548	26,706	7,504	46	2,678	6,953	563
79,333	109,547	131,913	74,325	55,193	28,069	80,449	97,985	104	7,166	26,895	1,313
5,598	4,815	4,741	4,742	2,741	1,955	5,382	432	10	908	2,277	0
1,598	3,675	10,666	2,821	2,782	1,332	3,823	28,653	22	419	1,343	46
3,460	4,338	28,521	2,778	1,724	1,472	2,723	5,344	25	287	2,133	137
4,318	5,610	15,142	4,291	2,646	1,672	458	7,825	0	0	1,948	1,035
3,374	6,617	7,048	4,110	2,651	1,590	4,597	910	54	510	1,144	0
10,937	14,225	30,696	9,669	4,528	2,406	579	16,964	57	1,215	5,335	238
7,136	7,730	11,685	4,790	6,415	2,891	6,821	20,689	21	728	3,157	110
41,154	42,664	59,598	39,574	27,634	13,424	30,257	25,682	121	5,205	14,318	0
15,918	25,455	23,053	15,261	8,760	5,686	14,240	18,333	40	2,173	6,119	75
71,436	110,838	129,502	68,324	37,094	29,214	96,139	60,433	282	9,184	29,035	0
4,544	4,488	5,253	4,594	3,836	1,724	6,525	11,029	10	699	1,458	0
10,747	15,003	15,753	9,553	7,766	5,418	9,172	11,824	118	1,214	3,437	0
6,176	8,521	11,118	5,097	3,058	2,651	8,214	6,652	44	991	2,526	0
3,295	5,918	7,135	2,711	3,246	2,230	4,306	19,591	30	413	1,676	0
14,326	15,497	7,865	11,451	4,054	2,647	9,121	8,690	0	1,174	2,012	0
5,511	9,993	9,375	5,688	2,964	2,856	5,567	4,826	133	690	1,364	103
2,919	5,329	4,354	2,203	3,074	1,822	2,043	20,121	25	541	1,267	178
143,269	363,585	872,751	125,738	127,765	105,142	294,962	392,255	44,286	5,510	35,889	0
45,569	121,715	367,042	42,062	64,533	49,901	116,420	127,024	18,133	2,230	1,936	0
8,807	7,837	19,700	9,768	4,688	3,923	15,585	3,558	63	1,327	4,432	75
6,268	12,907	26,397	5,610	7,940	5,601	4,333	72,473	0	12	3,843	1,222
3,418	4,758	3,859	3,994	1,622	888	4,829	518	100	549	1,337	0
91,171	133,120	148,748	84,373	56,497	31,607	124,788	47,492	298	9,853	34,002	13
$723,999	$1,188,472	$2,211,348	$661,486	$527,782	$363,229	$1,007,724	$1,378,431	65,306	69,108	239,474	7,478

Tons Carried	Intercity Mileage				Average Haul (Miles)	Lineheul Cost/Mile	Tons Carried		Shipments		Average Load (In Tons)
	Total Mileage	Owned Vehicles	Leased Vehicles	Intermodal Mileage			Tons LTL	Tons TL	LTL	TL	
1,060	45,887	44,179	0	1,708	343	$0.928	872	188	2,064	21	7.6
3,038	243,907	236,013	105	7,789	1,174	1.147	2,384	654	4,793	78	14.0
749	13,843	13,843	0	0	248	1.677	605	144	1,538	14	13.4
1,127	32,792	20,158	12,635	0	297	1.228	621	506	1,118	42	10.2
1,152	39,843	27,276	8,133	4,434	404	NA	548	604	1,056	43	10.4
1,238	57,608	52,661	4,497	450	457	0.926	1,033	205	2,150	29	9.8
1,589	76,929	27,266	49,663	0	NA	0.727	889	700	1,669	59	NA
2,552	161,946	134,677	(2,470)	29,739	678	1.116	2,052	501	4,733	58	11.2
2,683	56,483	55,736	0	747	212	1.061	1,162	1,522	2,907	105	9.9
4,454	81,048	14	81,034	0	154	NA	2,727	1,727	4,671	175	8.4
853	52,432	42,608	6,840	2,983	668	1.157	669	184	1,252	22	10.1
3,369	105,560	81,773	23,787	0	283	1.470	2,755	614	5,807	76	9.0
7,040	625,378	485,958	97,190	42,230	1,390	1.286	5,484	1,557	12,722	174	14.5
986	26,783	26,783	0	0	190	1.002	680	306	1,318	30	7.0
476	36,164	5,831	16,710	13,624	1,018	NA	400	76	1,003	9	13.4
632	26,284	20,235	4,871	1,177	421	1.215	472	160	1,012	15	9.7
1,055	30,149	0	30,149	0	281	NA	471	584	1,084	50	9.8
736	17,707	17,707	0	0	216	NA	602	134	1,229	15	9.0
1,066	83,687	0	82,798	889	1,304	1.221	731	335	1,554	33	16.8
1,141	52,122	43,490	7,760	871	314	0.882	647	495	1,239	46	6.6
4,566	288,607	272,160	0	16,447	706	0.848	3,266	1,300	6,978	128	10.4
2,448	93,232	84,694	0	8,539	366	1.279	1,831	617	3,716	77	8.2
7,239	582,109	521,680	750	59,679	1,218	1.208	5,634	1,605	13,224	186	13.9
981	28,883	28,883	0	0	261	1.000	568	413	1,203	32	8.9
1,801	59,564	59,468	0	96	316	1.222	1,380	421	3,078	42	8.8
1,355	32,544	29,865	0	2,680	235	0.809	956	397	2,191	38	9.0
811	26,640	11,910	14,930	0	343	0.953	569	241	957	27	10.1
2,184	70,949	70,949	0	0	254	NA	1,713	471	2,885	57	7.8
903	25,409	25,409	0	0	200	NA	784	120	1,939	15	7.1
1,132	30,857	11,975	13,885	4,997	310	0.966	389	744	825	52	8.9
NA	NA	NA	0	NA	NA	NA	NA	NA	NA	NA	NA
NA	NA	NA	0	NA	NA	NA	NA	NA	NA	NA	NA
1,317	51,590	51,590	0	0	455	1.172	927	390	2,270	44	11.6
895	107,783	55,739	52,044	0	1,546	0.878	695	200	1,309	25	12.8
497	16,873	16,878	0	0	436	NA	344	153	645	15	12.9
8,521	679,353	638,103	291	40,959	1,274	1.180	6,940	1,581	15,068	208	15.0
71,646	3,961,150	3,215,511	505,602	240,038	742	$1.145	51,802	19,849	111,117	2,040	12.5

Other Trucking Segments

(all dollar amounts in thousands)

Fleet Name, City & State	Gross Revenues	Total Operating Expenses	Net Operating Income	Interest Expense	Net Income	Operating Ratio	Profit Margin %	Salaries Wages & Fringes	Fuel, Oil & Lubricants
TRUCKLOAD GENERAL FREIGHT									
ACE TRANSPORTATION, INC., LAFAYETTE, LA	$91,016	$90,417	$598	$636	$786	99.3	0.86	$21,217	$46
BURLINGTON MOTOR CARRIERS, DALEVILLE, IN	249,520	239,347	10,173	10,793	(19,145)	95.9	-7.67	85,556	41,689
CRST, INC., CEDAR RAPIDS, IA	126,590	NA	NA	NA	NA	94.3	NA	0	NA
CONTRACT FREIGHTERS, INC., JOPLIN, MO	140,026	125,432	14,594	5,131	9,430	89.6	6.73	52,612	18,966
CRETE CARRIER CORP., LINCOLN, NE	152,483	141,877	10,606	576	10,905	93.0	7.15	32,662	15,385
CUSTOMIZED TRANSPORTATION, JACKSONVILLE, FL	89,350	84,147	5,203	5,590	(4,099)	94.2	-4.59	33,273	5,560
DART TRANSIT COMPANY, EAGAN, MN	104,227	100,764	3,463	1,221	1,681	96.7	1.61	5,470	0
DIRECT TRANSIT, INC., NORTH SIOUX CITY, SD	92,600	89,272	3,329	549	2,780	96.4	3.00	30,916	16,774
HEARTLAND EXPRESS OF IOWA, CORALVILLE, IA	73,796	70,340	3,455	0	2,231	95.3	3.02	13,590	6,126
INDEPENDENT FREIGHTWAY, INC., ROCKFORD, IL	158,656	151,945	6,711	1,661	2,827	95.8	1.78	7,064	0
J.B. HUNT TRANSPORT, INC., LOWELL, AR	731,584	672,312	59,272	10,823	27,804	91.9	3.80	292,684	77,769
LIGON NATIONWIDE, INC., MADISONVILLE, KY	101,322	98,328	2,994	2,184	227	97.0	0.22	6,377	0
M.S. CARRIERS, INC., MEMPHIS, TN	152,569	137,202	15,367	2,502	7,760	89.9	5.09	55,648	25,269
MERCER TRANSPORTATION CO., LOUISVILLE, KY	100,558	96,355	4,203	204	3,947	95.8	3.93	6,671	0
MISSOURI NEBRASKA EXPRESS, ST. JOSEPH, MO	288,660	283,123	5,537	2,858	1,661	98.1	0.58	53,098	21,561
MUNSON TRANSPORTATION, INC., MONMOUTH, IL	104,456	99,585	4,871	5,672	(496)	95.3	-0.47	36,949	12,999
NATIONAL FREIGHT, INC., VINELAND, NJ	101,869	103,212	(1,343)	3,696	(2,707)	101.3	-2.66	33,535	9,481
NEW PRIME, INC., SPRINGFIELD, MO	118,779	107,881	10,837	4,132	6,583	90.8	5.54	7,448	220
POOLE TRUCK LINE, INC., EVERGREEN, AL	101,727	101,495	232	5,081	(4,529)	99.8	-4.45	45,768	14,351
RANGER TRANSPORTATION, INC., JACKSONVILLE, FL	248,528	239,396	9,132	2,700	4,217	96.3	1.70	21,025	0
ROADRUNNER TRUCKING, INC., ALBUQUERQUE, NM	80,018	78,775	1,242	1,367	(956)	98.4	-1.19	22,100	12,476
ROBERSON TRPTN CO /PFT/CX, FARMER CITY, IL	80,053	78,062	1,991	984	1,433	97.5	1.79	15,063	7,020
RYDER DISTRIBUTION RESOURCES, MIAMI, FL	379,227	368,544	10,683	0	5,526	97.2	1.46	181,751	43,815
SCHNEIDER NATIONAL CARRIERS, GREEN BAY, WI	701,379	674,111	27,268	13,717	8,608	96.1	1.23	254,498	70,155
TRANSPORT CORP. OF AMERICA, MINNEAPOLIS, MN	88,387	NA	NA	NA	NA	94.9	NA	NA	NA
U.S. XPRESS, INC., CHATTANOOGA, TN	73,470	64,673	8,797	4,837	2,148	88.0	2.92	30,374	13,468
UNIVERSAL AM-CAN, LTD., WARREN, MI	111,855	112,163	(309)	452	(1,179)	100.3	-1.05	11,900	460
WERNER ENTERPRISES, OMAHA, NE	322,749	288,873	33,876	2,060	18,641	89.5	5.78	126,445	38,587
TOTAL TRUCKLOAD GENERAL FREIGHT	$5,160,454	$4,697,531	$462,942	$86,524	$86,184	90.9	1.67	$1,483,694	$452,177
TANK TRUCK									
CHEMICAL LEAMAN TANK LINES, EXTON, PA	$202,029	$191,563	$10,466	$4,944	$5,646	94.8	2.79	$67,063	$6,322
DSI TRANSPORTS, INC., HOUSTON, TX	80,532	73,543	6,989	571	4,260	91.3	5.29	36,820	5,269
GROENDYKE TRANSPORT, INC., ENID, OK	89,579	86,696	2,882	1,931	1,135	96.8	1.27	38,842	4,467
KOCH SERVICE, INC., WICHITA, KS	108,635	96,489	12,145	0	8,526	88.8	7.85	45,009	12,010
MATLACK, INC., WILMINGTON, DE	191,855	190,722	1,133	4,227	(1,980)	99.4	-1.03	68,512	6,923
MONTGOMERY TANK LINES, INC., PLANT CITY, FL	132,443	121,177	11,266	6,208	2,012	91.5	1.52	10,880	1,102
TOTAL TANK TRUCK	$804,073	$760,190	$44,881	$17,881	$19,599	94.4	2.43	$267,126	$36,113
MOTOR VEHICLE CARRIERS									
ALLIED SYSTEMS, LTD, DECATUR, GA	$177,073	$177,036	$36	$3,733	($4,271)	100.0	-2.41	$98,507	$10,808
ANCHOR MOTOR FREIGHT, BIRMINGHAM, MI	186,705	195,505	(8,800)	2,698	(11,433)	104.7	-6.12	102,628	14,775
CASSENS TRANSPORT CO., EDWARDSVILLE, IL	80,439	82,478	(2,040)	276	(1,403)	102.5	-1.74	44,991	5,197
COMMERCIAL CARRIERS, INC., TROY, MI	201,452	192,696	8,756	245	6,172	95.7	3.06	105,956	11,041
COMPLETE AUTO TRANSIT, INC., TROY, MI	183,523	180,598	2,925	855	1,910	98.4	1.04	98,660	11,218
M&G CONVOY, INC., TROY, MI	81,314	84,710	(3,396)	540	(2,641)	104.2	-3.25	42,389	3,700
TOTAL MOTOR VEHICLE CARRIERS	$910,506	$913,023	($2,519)	$8,347	($11,666)	100.3	-1.28	$493,131	$56,739
REFRIGERATED COMMODITIES									
C.R. ENGLAND & SONS, INC., SALT LAKE CITY, UT	$122,164	$113,652	$8,512	$3,474	$5,598	93.0	4.58	$43,973	$16,557
FFE TRANSPORTATION SERVICE, DALLAS, TX	139,926	131,795	8,131	1,489	5,353	94.2	3.83	19,252	2,115
FREYMILLER TRUCKING, INC., BAKERSFIELD, CA	92,360	90,217	2,143	4,550	(1,485)	97.7	-1.61	32,699	16,862
KLLM TRANSPORT SERVICES, INC., JACKSON, MS	129,571	120,707	8,864	4,037	2,820	93.2	2.18	42,517	22,606
MARTEN TRANSPORT, LTD., MONDOVI, WI	87,763	82,022	5,741	2,771	1,965	93.5	2.24	34,178	16,422
MIDWEST COAST TRANSPORT, SIOUX FALLS, SD	82,825	79,775	3,050	1,210	1,898	96.3	2.29	5,741	288
MONFORT TRANSPORTATION CO., GREELEY, CO	78,888	74,395	4,493	2	4,063	94.3	5.15	3,157	659
NATIONAL CARRIERS, INC., LIBERAL, KS	75,877	73,712	2,165	1,491	592	97.1	0.78	5,875	651
STEVENS TRANSPORT, MESQUITE, TX	83,287	75,801	7,486	NA	6,376	91.0	7.66	NA	NA
TOTAL REFRIGERATED COMMODITIES	$892,661	$842,076	$50,585	$19,024	$27,180	94.3	3.04	$187,392	$76,160
OTHER SPECIALIZED CARRIERS									
ANDERSON TRUCKING SERVICE, ST. CLOUD, MN	$119,466	$116,240	$3,226	$1,417	$990	97.3	0.83	$25,086	$9,912
BUILDERS TRANSPORT, INC., CAMDEN, SC	211,743	204,087	7,656	11,123	(3,385)	96.4	-1.60	78,010	27,937
MALONE FREIGHT LINES, INC., BIRMINGHAM, AL	77,090	75,960	1,130	215	529	98.5	0.69	3,235	0
MERCHANTS HOME DELIVERY SERVICE, OXNARD, CA	102,960	92,060	10,900	1,619	6,349	89.4	6.17	12,980	14
SIGNAL DELIVERY SERVICE, CLEVELAND, OH	171,490	167,233	4,257	4,058	(2,109)	97.5	-1.23	95,615	10,241
SWIFT TRANSPORTATION CO., INC., PHOENIX, AZ	190,337	177,274	13,063	2,948	6,466	93.1	3.40	77,908	31,181
TRI-STATE MOTOR TRANSIT, JOPLIN, MO	126,259	121,835	4,424	3,460	(157)	96.5	-0.12	44,184	6,076
TOTAL OTHER SPECIALIZED CARRIERS	$999,345	$954,689	$44,656	$24,840	$8,683	95.5	0.87	$337,018	$85,361

Parts, Tires Maintenance & Other	General Supplies & Expenses	Operating Taxes & Licenses	Insurance Expenses	Commun-cation & Utilities	Depreciation & Asset Disposition	Vehicle Rents/Purch Transport.	Equipment Operated				Tons Carried	Total Mileage
							Trucks Owned	Tractors Owned	Trailers Operated	Leased Vehicles		
($2,261)	$4,113	$1,224	$8,111	$1,644	$603	$55,720	0	0	1,076	1,372	NA	34,620
34,225	10,601	7,318	15,031	2,638	12,594	29,695	0	783	4,028	1,476	3,220	236,536
0	NA	NA	NA	NA	NA	NA	0	820	1,808	0	NA	NA
10,878	4,379	5,223	2,610	2,010	15,166	13,588	0	1,184	1,966	150	1,422	125,737
7,312	2,320	2,951	4,817	1,274	9,130	66,026	0	708	1,982	0	2,878	150,469
16,547	7,622	983	1,676	956	1,700	15,830	3	1	597	278	1,896	31,603
6,647	3,078	1,432	2,578	927	3,281	77,351	2	0	1,650	999	1,098	97,866
8,428	4,171	3,764	5,857	2,056	(152)	17,458	0	0	2,099	959	NA	87,535
3,398	1,431	2,117	3,676	520	183	39,299	0	326	1,620	0	1,172	64,225
1,792	13,773	196	5,506	1,241	680	121,693	0	0	2,036	1,626	2,060	124,703
49,018	23,367	65,018	34,118	10,314	69,111	50,913	0	5,579	12,389	0	10,337	708,163
188	9,098	11	3,163	832	889	77,770	0	7	1,577	878	1,710	83,250
8,517	12,348	4,965	7,864	2,803	18,185	1,603	0	1,227	2,478	0	3,716	132,287
234	5,815	1,745	3,572	1,343	353	76,622	0	0	764	764	1,722	87,866
9,807	12,379	4,218	7,877	2,295	7,907	163,981	0	18	2,125	783	1,223	101,479
12,216	6,178	10,723	3,723	1,848	12,636	2,313	7	907	1,672	19	2,233	101,764
6,984	4,377	7,064	5,455	2,369	11,075	20,872	0	943	3,424	0	1,952	88,187
4,401	3,347	473	2,011	1,086	9,750	79,145	0	485	901	0	1,756	109,603
8,163	3,875	10,950	4,454	1,369	5,050	7,515	0	492	2,038	522	1,916	106,900
5,472	21,656	745	4,652	1,346	1,991	182,509	0	0	4,352	2,592	3,808	231,528
9,389	3,856	3,400	3,463	1,306	5,029	17,756	0	452	1,041	56	1,549	77,640
3,874	7,951	2,586	657	1,369	2,310	37,232	0	425	1,269	504	1,928	78,874
18,082	20,094	1,020	11,167	2,640	1,281	88,694	4	5	3,108	2,687	3,855	180,860
71,325	51,250	57,287	29,548	12,016	6,064	121,968	0	0	13,329	4,751	10,994	643,903
NA	NA	NA	NA	NA	NA	NA	0	626	1,699	100	NA	NA
2,700	674	1,084	3,317	869	2,054	10,133	0	9	966	557	NA	73,784
1,553	8,274	1,419	3,356	1,964	3,676	79,561	5	265	968	0	2,612	72,037
21,266	9,108	32,576	13,518	4,015	37,656	5,702	0	2,553	5,740	117	4,366	308,359
$322,115	$209,130	$230,490	$181,773	$60,290	$239,[illegible]	$1,[illegible]	27	17,815	78,[illegible]	21,[illegible]	69,423	4,139,776
$21,547	$9,175	$5,048	$4,974	$4,543	$12,165	$60,726	0	754	2,599	621	3,559	84,278
8,322	7,503	4,193	2,123	1,310	6,478	1,505	0	357	647	92	4,519	46,984
6,772	4,104	3,978	4,546	938	6,231	16,818	0	466	1,355	382	4,708	59,840
15,125	9,616	1,950	771	1,488	8,871	1,649	0	735	1,100	0	NA	56,949
32,453	12,620	8,997	7,522	4,451	12,746	34,498	25	757	2,602	477	5,764	81,419
4,847	3,484	1,226	4,401	1,111	8,027	86,099	0	386	2,428	588	2,219	72,177
$89,[illegible]	$46,502	$25,392	$24,[illegible]	$13,841	$54,518	$[illegible]	25	3,455	10,731	2,[illegible]	20,769	401,647
$13,283	$14,465	$9,319	$8,866	$1,056	$5,360	$15,374	0	395	1,165	932	2,227	69,342
13,293	25,783	4,576	10,607	1,573	21,020	1,250	0	1,898	2,073	77	2,260	64,244
7,321	3,252	5,048	4,384	597	4,981	6,707	0	425	83	261	1,683	37,393
17,101	6,702	10,426	6,292	1,072	12,890	21,216	0	1,332	1,607	207	3,497	76,829
16,070	(1,127)	9,814	5,461	1,635	18,771	20,096	0	1,401	1,382	0	1,968	79,305
6,262	2,687	3,422	5,210	578	5,684	12,778	0	530	782	157	1,099	27,650
$75,330	$51,702	$42,005	$40,820	$6,511	$69,706	$77,423	0	5,981	7,072	1,634	12,734	354,763
$9,931	$3,720	$13,010	$2,477	$1,395	$6,765	$15,824	0	16	1,213	1,019	1,207	131,535
5,805	6,407	1,106	4,051	2,257	814	69,988	0	0	727	570	1,408	86,036
8,823	7,229	4,306	3,880	1,655	7,190	7,573	0	704	919	20	1,078	86,513
26,386	0	4,820	4,053	6,438	13,887	0	0	939	1,370	0	1,862	116,624
6,387	2,906	3,584	3,562	1,123	10,695	3,165	0	659	907	36	1,214	78,700
2,107	1,916	123	2,303	635	1,236	65,426	0	0	623	649	935	82,687
3,095	1,915	1,751	1,859	579	285	61,095	0	3	907	611	1,168	76,975
2,614	3,829	674	1,999	297	811	56,962	0	1	724	554	1,170	73,982
NA	NA	NA	NA	NA	NA	NA	0	600	780	0	NA	NA
$65,[illegible]	$[illegible],723	$29,[illegible]	$24,[illegible]	$14,[illegible]	$41,[illegible]	$[illegible],[illegible]	0	2,[illegible]	8,[illegible]	3,[illegible]	10,042	733,054
$10,060	$7,020	$3,665	$6,081	$1,788	$6,158	$46,450	75	332	2,443	646	1,042	87,052
20,878	17,764	22,057	12,794	3,860	18,051	2,736	0	1,609	2,895	461	6,689	198,795
1,578	7,190	203	3,860	527	136	59,231	NA	NA	NA	0	1,831	70,699
832	7,641	128	8,332	699	901	60,533	0	0	0	837	NA	NA
9,780	18,014	8,721	5,956	984	14,589	3,333	5	952	6,804	0	NA	90,805
18,667	16,441	6,541	4,989	2,513	12,278	4,756	0	1,679	3,989	0	NA	NA
7,934	6,825	8,372	4,330	2,118	2,379	39,617	16	35	1,439	825	1,016	95,754
$69,[illegible]	$[illegible],895	$51,[illegible]	$46,[illegible]	$12,[illegible]	$54,[illegible]	$[illegible],[illegible]	96	4,[illegible]	17,[illegible]	2,[illegible]	10,578	543,075

Fleet Name, City, State	Gross Revenues	Total Operating Expenses	Net Operating Income	Interest Expense	Net Income	Operating Ratio	Profit Margin %
HOUSEHOLD GOODS							
ALLIED VAN LINES, INC., NAPERVILLE, IL	$377,109	$370,751	$6,358	$4,548	$3,993	98.3	1.06
ATLAS VAN LINES, INC., EVANSVILLE, IN	212,394	200,532	11,861	9,299	2,378	94.4	1.12
BEKINS VAN LINES CO., HILLSIDE, IL	190,544	185,621	4,923	86	2,896	97.4	1.52
BURNHAM SERVICE CO., INC., COLUMBUS, GA	89,008	86,071	2,937	0	3,478	96.7	3.91
GRAEBEL VAN LINES, INC., WAUSAU, WI	95,906	93,251	2,656	373	1,338	97.2	1.40
MAYFLOWER TRANSIT, INC., CARMEL, IN	279,142	275,766	3,376	4,986	2,639	98.8	0.95
NORTH AMERICAN VAN LINES, INC., FT. WAYNE, IN	752,608	750,067	2,541	11,220	(11,320)	99.7	-1.50
UNITED VAN LINES, INC., FENTON, MO	474,913	474,624	289	2,704	1,378	99.9	0.29
TOTAL HOUSEHOLD GOODS	$2,471,624	$2,436,683	$34,941	$33,216	$6,780	98.6	0.27

Definitions and Explanations Of Financial Terminology Used On The Charts

Operating Ratio: Operating expenses as a percentage of gross revenues. Since it excludes extraordinary expenses, income taxes and interest, individual peculiarities are eliminated so the ratio may be used as an industry-wide measure of performance.

Other Fringes: Includes charges such as federal and state payroll taxes, group and workers' compensation insurance, pension and retirement plans through both commercial insurance and unions.

Maintenance/Operating Supplies and Expenses: Includes fuel, oil, lubricants and coolants, vehicle parts, vehicle maintenance by outside vendors, tires and tubes, and miscellaneous supplies such as hand tools, brake fluid and antifreeze.

General Supplies and Expenses: Includes costs of administrative supplies including computer software, books, magazines, magnetic tapes, postage, stationery, printing of tariffs, advertising, commission agent fees, solicitation commissions, company personnel's T&E expenses. Also building and equipment rents and miscellaneous expenses such as fees for professional services by physicians, attorneys, etc., plus uncollectable revenues.

Operating Taxes and Licenses: Includes fuel and oil taxes, vehicle license and registration fees based on usage, real estate and personal property taxes, and tax items such as capital stock taxes, gross receipts taxes, occupancy taxes, etc.

Depreciation and Amortization & Gain or Loss on Disposition of Operating Assets: Includes depreciation of structures on owned land, revenue and shop equipment, furniture and office equipment; amortization of: improvements to leasehold property, fixed term motor carrier franchises, permits, licenses, patent rights, etc.; gain or loss on disposition of operating assets such as sold, traded or retired tractors, trailers and trucks.

Revenue Equipment Rents and Purchased Transportation: Includes amounts payable for: furnishing vehicles with or without the services of drivers, transportation of shipments in another carrier's vehicle including intermodal fleets, and allowance to shippers for picking up or delivering freight to a carrier's facility.

Fleets whose operating ratio improved the most

Fleet, City, State	No. of points OR improved
ANR Freight System, Denver, Colo.	-15.6
FFE Transportation Service, Dallas, Tex.	-3.7
U.S. Xpress, Chattanooga, Tenn.	-3.2
United Parcel Service, Atlanta, Ga.	-3.0
Chemical Leaman Tank Lines, Exton, Pa.	-2.9

Fleets with the best post-tax net profit margin

Fleet, City, State	Post-tax Profit Margin
New Penn Motor Express, Lebanon, Pa.	15.8%
Koch Service, Wichita, Kans.	7.8%
Stevens Transport, Mesquite, Tex.	7.7%
Southeastern Freight Lines, Columbia, S.C.	7.4%
Estes Express, Richmond, Va.	7.2%
Crete Carrier Corp., Lincoln, Neb.	7.2%
Contract Freighters !nc., Joplin, Mo.	6.7%
Merchants Home Delivery Service, Oxnard, Calif.	6.2%

Fleets whose post-tax net income improved the most

Fleet, City, State	Net Income by Percent Point Change
ANR Freight System, Denver, Colo.	9.6
FFE Transportation Service, Dallas, Tex.	2.7
Central Transport, Warren, Mich.	2.5
Chemical Leaman Tank Lines, Exton, Pa.	2.3
New Prime, Springfield, Mo.	2.1
Customized Transportation, Jacksonville, Fla.	2.1

oil fell from $22.34 to $19.19.

• Exports were up by $42 billion and imports declined by $3 billion.

• With the lowest Federal Reserve discount rate since the early 1960s, the prime interest rate dropped to 8.5%.

With a recessionary economy–which forced more than 2,000 carriers into bankruptcy–and all the other sour ingredients the industry had to cope with last year, it's miraculous that the cake came out of the truckers' oven in one piece.

But many of the nation's leading common carriers knew how to handle the heat.

As a result, group averages for the less-than-truckload, reefer and tank-truck sectors of the *Top 100* had essentially the same ORs in 1991 as they did the previous year.

And the truckload carriers' aggregate OR improved from 94.8 in 1990 to 90.9 last year.

So, the latest *Top 100* cake is palatable. But any way you slice it, it's hard to swallow. And not many fleets would want "seconds."

Net income up 4%

Compared to 1990 data, the aggregate gross revenues were up 5.9% last year, and expenses climbed 6%. The group's post-tax net income rose 4%.

And although their aggregate revenues increased 5.5%, the Big Four–United Parcel Service, Yellow Freight, Consolidated Freightways and Roadway Express–continued to capture about 49% of the total *Top 100* revenues.

The Big Four had 19.5% of the *Top 100* fleets' revenues when the rankings were first published in 1968.

But, of those four, only Roadway improved its operating ratio (95.2) last year.

Lowest OR

For the fourth time in five years, New Penn Motor Express

Continued

TOP 100

(all dollar amounts in thousands)

1991 Revenue Rank	Fleet Name, City, State	Carrier Type	1991 Revenue	1990 Revenue	1990 Revenue Rank	Operating Ratio 1991	Rank	1990	Rank
1	UNITED PARCEL SERVICE (OHIO), ATLANTA, GA	CMGF	$8,524,001	$7,908,781	1	92.9	21	93.7	28
2	UNITED PARCEL SERVICE (NEW YORK), ATLANTA, GA	CMGF	3,196,740	2,958,831	2	97.0	57 T	100.0	91
3	YELLOW FREIGHT SYSTEM, INC., OVERLAND PARK, KS	CMGF	2,323,268	2,278,540	3	98.9	79	95.2	37
4	CONSOLIDATED FREIGHTWAYS CORP., PORTLAND, OR	CMGF	2,045,250	2,080,794	4	97.7	68 T	95.2	37
5	ROADWAY EXPRESS, INC., AKRON, OH	CMGF	2,041,314	1,965,196	5	95.2	40	95.2	41
6	OVERNITE TRANSPORTATION CO., RICHMOND, VA	CMGF	799,769	801,832	6	95.0	39	90.6	13
7	ABF FREIGHT SYSTEM, INC., FORT SMITH, AR	CMGF	783,024	750,892	8	96.3	48 T	95.1	35
8	NORTH AMERICAN VAN LINES, INC., FORT WAYNE, IN	CMHG	752,608	775,648	7	99.7	84	102.0	94
9	J.B. HUNT TRANSPORT, INC., LOWELL, AR	CMGF	731,584	579,831	9	91.9	17	90.2	11
10	SCHNEIDER NATIONAL CARRIERS, INC., GREEN BAY, WI	CMGF	701,379	583,845	NR	96.1	47	94.0	NR
11	CAROLINA FREIGHT CARRIERS CORP., CHERRYVILLE, NC	CMGF	583,592	572,222	10	98.6	77	98.4	73
12	CON-WAY TRANSPORTATION SERVICES, PORTLAND, OR	CMGF	534,496	484,838	11	92.4	19	88.8	5
13	UNITED VAN LINES, INC., FENTON, MO	CMHG	474,913	473,497	12	99.9	86 T	99.6	87
14	PRESTON TRUCKING COMPANY, INC., PRESTON, MD	CMGF	414,138	404,564	13	100.8	93	98.6	74
15	RYDER DISTRIBUTION RESOURCES, INC., MIAMI, FL	CTGF	379,227	314,735	16	97.2	60 T	96.4	50
16	ALLIED VAN LINES, INC., NAPERVILLE, IL	CMHG	377,109	398,580	14	98.3	72	98.6	74
17	WERNER ENTERPRISES, INC., OMAHA, NE	CTGF	322,749	305,134	18	89.5	7	89.2	8
18	ST. JOHNSBURY TRUCKING CO., INC., HOLLISTON, MA	CMGF	304,721	331,883	15	100.5	91	95.1	35
19	CENTRAL TRANSPORT, INC., WARREN, MI	CMGF	302,328	265,263	19	98.4	73 T	99.6	87
20	MISSOURI NEBRASKA EXPRESS (MNX), ST. JOSEPH, MO	CMGF	288,660	198,920	38	98.1	70 T	98.2	72
21	TNT HOLLAND MOTOR EXPRESS, INC., HOLLAND, MI	CMGF	283,459	250,870	20	91.0	11 T	88.8	5
22	MAYFLOWER TRANSIT, INC. CARMEL, IN	CMHG	279,142	310,477	17	98.8	78	99.0	80
23	WATKINS MOTOR LINES, INC., LAKELAND, FL	CMGF	267,445	246,551	21	94.3	31 T	93.7	28
24	NORTHWEST TRANSPORT SERVICE, COMMERCE CITY, CO	CMGF	258,844	223,054	29	94.9	37 T	91.9	20
25	BURLINGTON MOTOR CARRIERS, INC., DALEVILLE, IN	CMGF	249,520	235,231	25	95.9	48	94.6	31
26	RANGER TRANSPORTATION, INC., JACKSONVILLE, FL	CMGF	248,528	236,845	24	96.3	48 T	97.2	58
27	VIKING FREIGHT SYSTEM, INC., SAN JOSE, CA	CMGF	233,754	223,495	28	93.7	28	90.8	16
28	CENTRAL FREIGHT LINES, INC., WACO, TX	CMGF	219,422	226,418	27	97.5	65 T	96.5	52
29	ATLAS VAN LINES, INC., EVANSVILLE, IN	CMHG	212,394	216,679	32	94.4	34 T	93.1	26
30	BUILDERS TRANSPORT, INC., CAMDEN, SC	CTBM	211,743	240,756	22	96.4	51 T	97.3	60
31	CHEMICAL LEAMAN TANK LINES, INC., EXTON, PA	CTLP	202,029	210,871	35	94.8	36	97.7	66
32	COMMERCIAL CARRIERS, INC., TROY, MI	CMMV	201,452	204,385	36	95.7	43	97.3	60
33	ARKANSAS FREIGHTWAYS CORP., HARRISON, AR	CMGF	198,465	142,952	47	92.7	20	90.4	12
34	MATLACK, INC., WILMINGTON, DE	CTLP	191,355	216,685	31	99.4	83	96.8	55
35	BEKINS VAN LINES COMPANY, HILLSIDE, IL	CMHG	190,544	212,704	33	97.4	64	97.8	68
36	SWIFT TRANSPORTATION COMPANY, INC., PHOENIX, AZ	CMSC	190,337	156,330	43	93.1	24	90.1	10
37	ANCHOR MOTOR FREIGHT, INC., BIRMINGHAM, MI	CTMV	186,705	231,315	26	104.7	98	100.3	92
38	COMPLETE AUTO TRANSIT, INC., TROY, MI	CTMV	183,523	217,058	30	98.4	73 T	97.4	62
39	ALLIED SYSTEMS *LTD*, DECATUR, GA	CMMV	177,073	199,579	37	100.0	88	99.8	90
40	SIGNAL DELIVERY SERVICE, INC., CLEVELAND, OH	CTSC	171,490	211,593	34	97.5	65 T	96.1	47
41	TNT RED STAR EXPRESS, INC., AUBURN, NY	CMGF	170,563	158,873	41	100.1	89	97.4	62
42	AAA COOPER TRANSPORTATION, DOTHAN, AL	CMGF	166,887	157,863	42	91.1	13	89.0	7
43	CHURCHILL TRUCK LINES, INC., CHILLICOTHE, MO	CMGF	164,994	160,999	40	100.6	92	98.1	71
44	AVERITT EXPRESS, INC., COOKEVILLE, TN	CMGF	164,006	142,657	48	93.4	26	93.9	30
45	SOUTHEASTERN FREIGHT LINES, INC., COLUMBIA, SC	CMGF	158,927	154,422	45	92.3	18	90.6	13
46	INDEPENDENT FREIGHTWAY, INC., ROCKFORD, IL	CMGF	158,656	154,877	44	95.8	44 T	96.1	47
47	OLD DOMINION FREIGHT LINE, INC., HIGH POINT, NC	CMGF	155,864	147,319	46	91.5	15 T	92.6	21
48	M.S. CARRIERS, INC., MEMPHIS, TN	CTGF	152,569	123,577	57	89.9	9	89.4	9
49	CRETE CARRIER CORPORATION, LINCOLN, NE	CMGF	152,483	131,366	50	93.0	22 T	95.0	33
50	CONTRACT FREIGHTERS, INC., JOPLIN, MO	CMGF	140,026	119,864	58	89.6	8	87.5	4

For Top 100 listings under "Type": BM—building materials; CM—common; CT—contracts; GF—general freight; ED—explosives/dangerous articles; FP—forest products; HG—household goods; HM—heavy machinery; LP—liquid petroleum (including, in most cases, other bulk materials); MV—motor vehicles; RS—retail store delivery; SC—specific commodity not otherwise grouped; T—tie in Operating Ratio; NR—not ranked.

1991 Revenue Rank	Fleet Name, City, State	Carrier Type	1991 Revenue	1990 Revenue	1990 Revenue Rank	Operating Ratio			
						1991	Rank	1990	Rank
51	FFE TRANSPORTATION SERVICE, INC., DALLAS, TX	CMRC	$139,926	$130,908	51	94.2	29 T	97.9	69
52	A-P-A TRANSPORT CORP., NORTH BERGEN, NJ	CMGF	138,043	141,852	49	94.4	34 T	92.6	21
53	MONTGOMERY TANK LINES, INC., PLANT CITY, FL	CMLP	132,443	126,563	52	91.5	15 T	91.1	17
54	NEW PENN MOTOR EXPRESS, INC., LEBANON, PA	CMGF	129,618	125,025	55	79.7	1	79.3	1
55	KLLM, INC., JACKSON, MS	CMRC	129,571	125,759	53	93.2	25	92.7	25
56	CRST, INC., CEDAR RAPIDS, IA	CMGF	126,590	119,349	NR	94.3	31 T	94.6	NR
57	TRI-STATE MOTOR TRANSIT CO., JOPLIN, MO	CMSC	126,259	116,192	59	96.5	53	95.0	33
58	ANR FREIGHT SYSTEM, INC., DENVER, CO	CMGF	123,442	169,031	39	125.3	100	140.9	100
59	C.R. ENGLAND & SONS, INC., SALT LAKE CITY, UT	CMRS	122,164	97,191	72	93.0	22 T	92.6	21
60	ADVANCE TRANSPORTATION COMPANY, MILWAUKEE, WI	CMGF	119,980	114,289	60	98.1	70 T	96.4	50
61	ANDERSON TRUCKING SERVICE, INC., ST. CLOUD, MN	CTSC	119,466	113,204	61	97.3	62 T	95.2	37
62	NEW PRIME, INC., SPRINGFIELD, MO	CMGF	118,779	98,633	71	90.8	10	92.6	21
63	UNIVERSAL AM-CAN, LTD., WARREN, MI	CMGF	111,855	105,635	64	100.3	90	98.8	78
64	ESTES EXPRESS LINES, RICHMOND, VA	CMGF	111,477	96,861	NR	87.5	2	84.1	NR
65	SAIA MOTOR FREIGHT LINE, INC., HOUMA, LA	CMGF	109,402	102,553	69	89.1	5	86.1	3
66	KOCH SERVICE, INC., WICHITA, KS	CMLP	108,635	102,111	70	88.8	4	85.3	2
67	MERCHANTS FAST MOTOR LINES, INC., ABILENE, TX	CMGF	105,286	103,168	68	99.3	81 T	98.6	74
68	MUNSON TRANSPORTATION, INC., MONMOUTH, IL	CMGF	104,456	107,850	63	95.3	41 T	95.7	43
69	HYMAN FREIGHTWAYS, INC., ST. PAUL, MN	CMGF	104,260	103,637	67	99.0	80	99.0	80
70	DART TRANSIT COMPANY, EAGAN, MN	CMGF	104,227	97,083	73	96.7	54 T	95.2	37
71	G.I. TRUCKING COMPANY, LA MIRADA, CA	CMGF	103,334	103,815	66	97.3	62 T	94.7	32
72	MERCHANTS HOME DELIVERY SERVICE, INC., OXNARD, CA	CMSC	102,960	96,236	74	89.4	6	91.5	18
73	NATIONAL FREIGHT, INC., VINELAND, NJ	CMGF	101,869	123,693	56	101.3	94	99.7	89
74	POOLE TRUCK LINE, INC., EVERGREEN, AL	CTGF	101,727	110,734	62	99.8	85	96.7	53
75	LIGON NATIONWIDE, INC., MADISONVILLE, KY	CMGF	101,322	104,855	65	97.0	57 T	97.7	66
76	MERCER TRANSPORTATION CO., INC., LOUISVILLE, KY	CMGF	100,558	88,305	NR	95.8	44 T	96.0	NR
77	GRAEBEL VAN LINES, INC., WAUSAU, WI	CMHG	95,906	94,175	75	97.2	60 T	97.2	58
78	DIRECT TRANSIT, INC., NORTH SIOUX CITY, SD	CMGF	92,600	64,141	NR	96.4	51 T	95.8	NR
79	FREYMILLER TRUCKING, INC., BAKERSFIELD, CA	CMRC	92,360	86,086	78	97.7	68 T	90.6	13
80	ACE TRANSPORTATION, INC., LAFAYETTE, LA	CMGF	91,016	125,527	54	99.3	81 T	98.8	78
81	GROENDYKE TRANSPORT, INC., ENID, OK	CMLP	89,579	85,787	79	96.8	56	95.8	44
82	SPARTAN EXPRESS, INC., GREER, SC	CMGF	89,488	78,595	88	107.0	99	104.3	97
83	CUSTOMIZED TRANSPORTATION, INC., JACKSONVILLE, FL	CTGF	89,350	95,590	NR	94.2	29 T	95.5	NR
84	BURNHAM SERVICE COMPANY, INC., COLUMBUS, GA	CMHG	89,008	92,513	77	96.7	54 T	96.7	53
85	TRANSPORT CORP. OF AMERICA, MINNEAPOLIS, MN	CMGF	88,387	88,259	NR	94.9	37 T	94.4	NR
86	MARTEN TRANSPORT, LTD., MONDOVI, WI	CMRC	87,763	81,349	84	93.5	27	93.4	27
87	STEVENS TRANSPORT, MESQUITE, TX	CMRC	83,287	71,060	NR	91.0	11 T	90.8	NR
88	MIDWEST COAST TRANSPORT, L.P., SIOUX FALLS, SD	CMRC	82,825	79,261	87	96.3	48 T	96.3	49
89	M&G CONVOY, INC., TROY, MI	CMMV	81,314	92,817	76	104.2	97	103.4	96
90	TRANSUS, INC., ATLANTA, GA	CMGF	81,208	80,370	85	101.7	95	98.7	77
91	DSI TRANSPORTS, INC., HOUSTON, TX	CMLP	80,532	76,486	89	91.3	14	91.6	19
92	CASSENS TRANSPORT COMPANY, EDWARDSVILLE, IL	CMMV	80,439	74,969	92	102.5	96	102.2	95
93	ROBERSON TRPTN CO./PFT/CX, FARMER CITY, IL	CMGF	80,053	83,715	81	97.5	65 T	97.9	69
94	ROADRUNNER TRUCKING, INC., ALBUQUERQUE, NM	CMGF	80,018	82,794	82	98.4	73 T	96.0	46
95	MONFORT TRANSPORTATION CO., GREELEY, CO	CMRC	78,888	69,140	NR	94.3	31 T	95.0	NR
96	MALONE FREIGHT LINES, INC., BIRMINGHAM, AL	CMSC	77,090	70,986	96	98.5	76	99.5	86
97	NATIONAL CARRIERS, INC., LIBERAL, KS	CMRC	75,877	76,248	90	97.1	59	95.8	44
98	WILLIG FREIGHT LINES, SAN FRANCISCO, CA	CMGF	75,189	81,367	83	99.9	86 T	95.6	42
99	HEARTLAND EXPRESS INC. OF IOWA, CORALVILLE, IA	CMGF	73,796	62,810	NR	95.3	41 T	97.4	NR
100	U.S. XPRESS, INC., CHATTANOOGA, TN	CMGF	73,470	54,421	NR	88.0	3	91.2	NR

	Gross Revenue	Expenses	Post Tax Net Income
Total Top 100-1991	$36,832,661	$35,237,981	$818,857
Total Top 100-1990	$34,748,368	$33,235,682	$790,676
Total Top 100-1989	$32,356,211	$30,983,015	$730,865

TOP 100

(all dollar amounts in thousands)

1991 Revenue Rank	Fleet Name, City, State	Carrier Type	1991 Revenue	1990 Revenue	Operating Ratio 1991	Operating Ratio 1990
101	JACK COOPER TRANSPORT COMPANY, OKLAHOMA CITY, OK	CMMV	$73,372	$79,509	99.5	97.5
102	AMERICAN PRESIDENT TRUCKING CO., LTD., OAKLAND, CA	CMGF	72,753	53,059	98.8	112.0
103	MILLER TRANSPORTERS, INC., JACKSON, MS	CTLP	72,376	75,929	98.4	99.0
104	E&L TRANSPORT COMPANY, WAYNE, MI	CTMV	71,673	85,735	110.1	109.7
105	JACK GRAY TRANSPORT, INC., GARY, IN	CMSC	71,355	74,530	98.6	97.0
106	DALLAS & MAVIS FORWARDING CO., KENOSHA, WI	CMMV	67,932	74,243	95.4	96.9
107	ROEHL TRANSPORT, INC., MARSHFIELD, WI	CMGF	67,399	60,051	91.8	88.9
108	WILLIS SHAW FROZEN EXPRESS, INC., ELM SPRINGS, AR	CTRC	67,325	63,830	90.2	90.5
109	FORE WAY EXPRESS, INC., WAUSAU, WI	CMGF	65,760	67,469	99.8	99.2
110	P.A.M. TRANSPORTATION SERVICES, TONTITOWN, AR	CMGF	65,722	57,545	101.8	105.3
111	PAUL ARPIN VAN LINES, EAST GREENWICH, RI *	CMHG	65,404	55,473	97.8	99.0
112	SOUTHWEST MOTOR FREIGHT, INC., CHATTANOOGA, TN	CMGF	64,061	58,977	92.5	99.9
113	PACIFIC MOTOR TRUCKING CO., OKLAHOMA CITY, OK	CTMV	63,887	64,370	92.6	93.8
114	CROUSE CARTAGE COMPANY, CARROLL, IA	CMGF	63,449	61,168	95.9	95.3
115	GLOBAL VAN LINES, INC., ORANGE, CA	CMHG	62,326	56,865	98.5	98.2
116	TNT REDDAWAY TRUCK LINE, INC., CLACKAMAS, OR	CMGF	61,615	50,976	88.8	88.1
117	MAY TRUCKING COMPANY, PAYETTE, ID	CMRC	61,356	60,002	99.0	99.3
118	JONES MOTOR COMPANY, INC., SPRING CITY, PA	CMGF	61,176	64,890	100.4	101.6
119	ACME TRUCK LINE, INC., HARVEY, LA	CMGF	60,988	61,436	97.8	97.3
120	STANDARD TRUCKING COMPANY, CHARLOTTE, NC	CMGF	60,090	58,472	99.4	97.5
121	NEW ENGLAND MOTOR FREIGHT, INC., ELIZABETH, NJ	CMGF	60,030	56,891	96.8	96.7
122	TNT BESTWAY TRANSPORTATION, INC., PHOENIX, AZ *	CMGF	59,731	60,404	98.5	94.2
123	ARROW TRUCKING COMPANY, TULSA, OK	CMSC	59,372	49,073	94.1	93.4
124	SHAFFER TRUCKING, INC., NEW KINGSTOWN, PA	CMRC	59,238	49,550	91.4	92.2
125	WILSON TRUCKING CORP., FISHERSVILLE, VA	CMGF	59,029	59,632	95.0	92.8
126	CONTRACT TRANSPORTATION SYSTEMS CO., CLEVELAND, OH	CTGF	59,005	54,206	88.5	91.7
127	MORGAN DRIVE AWAY, INC., ELKHART, IN	CMSC	58,607	65,950	100.0	97.6
128	ALTERMAN TRANSPORT LINES, INC., OPA LOCKA, FL	CMRC	58,204	58,618	98.4	100.0
129	WARREN TRANSPORT, INC., WATERLOO, IA	CMGF	57,003	56,049	93.1	93.1
130	SOUTHWESTERN MOTOR TRANSPORT, SAN ANTONIO, TX	CMGF	56,361	57,871	98.2	97.6
131	BE-MAC TRANSPORT CO., INC., ST. LOUIS, MO	CMGF	54,827	52,914	101.4	100.0
132	CENTRAL TRANSPORT, INC., HIGH POINT, NC	CTLP	54,813	57,528	92.4	95.8
133	SAVAGE INDUSTRIES, INC., SALT LAKE CITY, UT	CMBC	54,700	45,331	97.7	93.8
134	PBX, INC., DAKOTA CITY, NE	CTGF	54,129	50,671	89.7	88.5
135	GLENN McCLENDON TRUCKING CO., INC., LAFAYETTE, AL	CMGF	54,085	50,056	91.3	91.8
136	HADLEY AUTO TRANSPORT, SANTA ANA, CA	CTMV	53,634	57,518	98.9	97.1
137	CARNACO TRANSPORT, INC., OCONOMOWOC, WI	CTRC	53,135	50,000	91.5	91.0
138	WILEY SANDERS TRUCK LINES, INC., TROY, AL	CMGF	52,778	50,970	88.5	83.2
139	JACK B. KELLEY, INC., AMARILLO, TX	CMSC	52,583	57,380	100.5	99.4
140	ARMELLINI EXPRESS LINES, INC., PALM CITY, FL	CMRC	52,556	51,060	98.5	98.4
141	USA TRUCK, INC., VAN BUREN, AR	CMGF	52,538	45,684	88.9	NA
142	TRANSCONTINENTAL REFRIGERATED LINES, PITTSTON, PA	CMRP	52,157	40,797	94.0	99.5
143	MOTOR CARGO, NORTH SALT LAKE, UT	CMGF	51,853	49,068	95.0	91.9
144	DEATON, INC., BIRMINGHAM, AL	CMSC	50,753	52,511	102.3	99.5
145	JONES TRANSFER COMPANY, MONROE, MI	CTGF	50,748	60,035	104.7	99.6
146	BULKMATIC TRANSPORT COMPANY, GRIFFITH, IN	CMBC	50,746	46,104	95.7	94.5
147	TLC LINES, INC., ST. CLAIR, MO	CMGF	50,601	50,653	99.0	98.5
148	TRANSPORT SERVICE CO., HINSDALE, IL	CTLP	50,024	43,589	89.1	88.1
149	LYNDEN TRANSPORT, INC., KENT, WA	CMGF	49,534	46,691	95.5	92.3
150	TMC TRANSPORTATION, INC., DES MOINES, IA	CTGF	49,486	49,732	95.2	94.0

1991 Revenue Rank	Fleet Name, City, State	Carrier Type	1991 Revenue	1990 Revenue	Operating Ratio 1991	Operating Ratio 1990
151	**McKENSIE TANK LINES, INC., TALLAHASSEE, FL**	**CMLP**	**$49,428**	**$48,908**	**95.1**	**96.8**
152	**COMMERCIAL CARRIER CORP., AUBURNDALE, FL**	**CMGF**	**48,900**	**50,297**	**93.3**	**89.2**
153	**GREAT COASTAL EXPRESS, INC., CHESTER, VA**	**CMGF**	**47,304**	**45,507**	**93.0**	**89.9**
154	**SMITHWAY MOTOR XPRESS, INC., FORT DODGE, IA ***	**CMGF**	**47,368**	**47,486**	**95.8**	**96.3**
155	**NU-CAR CARRIERS, INC., BIRMINGHAM, MI**	**CMMV**	**47,057**	**73,896**	**123.4**	**108.0**
156	ECK MILLER TRANSPORTATION CORP., ROCKPORT, IN	CMGF	46,017	48,988	94.9	96.7
157	KENAN TRANSPORT COMPANY, CHAPEL HILL, NC	CMLP	45,940	45,397	93.4	96.9
158	WARD TRUCKING CORP., ALTOONA, PA *	CMGF	45,750	44,353	99.6	103.9
159	SKYWAY FREIGHT SYSTEM, INC., SANTA CRUZ, CA	CMGF	45,484	NA	91.6	NA
160	FREDRICKSON MOTOR EXPRESS CORP., CHARLOTTE, NC	CMGF	45,419	44,155	97.7	99.5
161	**PITT OHIO EXPRESS, INC., PITTSBURGH, PA**	**CMGF**	**45,132**	**36,384**	**85.5**	**85.4**
162	**VICTORY EXPRESS, INC., MEDWAY, OH**	**CMGF**	**45,073**	**37,069**	**90.8**	**89.7**
163	**THE MASON & DIXON LINES, INC., WARREN, MI**	**CMGF**	**43,537**	**42,678**	**98.1**	**97.0**
164	**WHEATON VAN LINES, INC., INDIANAPOLIS, IN ***	**CMHG**	**42,931**	**46,810**	**100.2**	**98.9**
165	**LANTER COMPANY, MADISON, IL**	**CMGF**	**42,586**	**11,220**	**92.8**	**93.0**
166	MIDDLEWEST FREIGHTWAYS, INC., ST. LOUIS, MO	CMGF	42,561	45,048	104.7	99.0
167	KEYSTONE LINES, ANAHEIM, CA	CMGF	42,286	41,775	100.0	98.1
168	PACIFIC MOTOR TRANSPORT, LAFAYETTE, CA	CMSC	41,826	38,312	93.8	94.0
169	GREAT AMERICAN LINES, INC., MURRYSVILLE, PA	CMGF	41,685	41,889	99.2	97.9
170	GEORGE TRANSFER, INC., PARKTON, MD	CMGF	41,604	41,340	98.2	97.5
171	**SMALLEY TRANSPORTATION COMPANY, TAMPA, FL**	**CMGF**	**41,194**	**51,972**	**103.7**	**100.6**
172	**NEW WORLD VAN LINES, INC., CHICAGO, IL**	**CMHG**	**40,926**	**40,925**	**95.1**	**94.8**
173	**D.M. BOWMAN, INC., WILLIAMSPORT, MD**	**CMGF**	**40,854**	**43,378**	**97.7**	**97.1**
174	**CTL DISTRIBUTION, INC., MULBERRY, FL ***	**CMSC**	**40,471**	**27,337**	**94.0**	**96.1**
175	**RED ARROW FREIGHT LINES, INC., CHERRYVILLE, NC**	**CMGF**	**40,275**	**32,968**	**100.9**	**100.2**
176	DAILY EXPRESS, INC., CARLISLE, PA	CMSC	40,199	47,632	98.0	97.0
177	THE MANFREDI MOTOR TRANSIT CO., NEWBURY, OH	CMRC	39,995	41,076	95.7	93.3
178	UNION PACIFIC MOTOR FREIGHT CO., ST. LOUIS, MO	CMGF	39,750	40,399	86.8	94.9
179	SCHWERMAN TRUCKING CO., MILWAUKEE, WI	CMBC	39,265	39,365	99.9	97.8
180	COLONIAL FREIGHT SYSTEMS, INC., KNOXVILLE, TN	CMRC	39,217	38,115	99.0	97.5
181	**SUNFLOWER CARRIERS, INC., YORK, NE**	**CTGF**	**39,080**	**30,741**	**90.2**	**91.8**
182	**MILAN EXPRESS CO., INC., MILAN, TN**	**CMGF**	**39,066**	**38,014**	**97.4**	**97.3**
183	**RUAN TRANSPORT CORP., DES MOINES, IA ***	**CMGF**	**38,999**	**35,191**	**100.0**	**99.6**
184	**HOLMES FREIGHT LINES, INC., OMAHA, NE ***	**CMGF**	**38,987**	**38,211**	**99.5**	**95.9**
185	**LIQUID TRANSPORTERS, INC., LOUISVILLE, KY**	**CMLP**	**38,387**	**39,068**	**100.4**	**94.9**
186	PLOOF TRUCK LINES, INC., JACKSONVILLE, FL *	CMGF	38,319	41,489	91.7	86.7
187	INDUSTRIAL FREIGHT SYSTEM, INC., SUN VALLEY, CA	CMGF	38,219	49,025	97.5	98.6
188	A.J. METLER HAULING & RIGGING, INC., KNOXVILLE, TN	CMSC	36,807	38,693	98.9	98.5
189	MOUNTAINSIDE TRANSPORT, INC., CLEVELAND, OH	CTGF	36,725	35,218	100.2	99.4
190	UMTHUN TRUCKING COMPANY, EAGLE GROVE, IA	CTGF	36,696	39,135	100.7	99.5
191	**COMPASS TRANSPORTATION, INC., YOUNGSTOWN, OH**	**CMSC**	**36,399**	**37,678**	**100.2**	**99.9**
192	**SUPERIOR CARRIERS, INC., OAK BROOK, IL**	**CMLP**	**36,350**	**33,538**	**93.3**	**92.3**
193	**FLORIDA ROCK & TANK LINES, INC., JACKSONVILLE, FL**	**CMLP**	**36,288**	**36,301**	**93.7**	**95.8**
194	**CRESCENT TRUCK LINES, INC., UNION CITY, CA**	**CMGF**	**35,901**	**36,800**	**96.9**	**94.5**
195	**BOYD BROTHERS TRANSPORTATION CO., CLAYTON, AL**	**CMGF**	**35,872**	**34,730**	**91.8**	**90.2**
196	GOODWAY TRANSPORT, INC., YORK, PA	CMRS	35,734	29,941	96.3	95.3
197	ENTERPRISE TRANSPORTATION CO., HOUSTON, TX	CMLP	35,679	38,142	98.0	94.1
198	SCHANNO TRANSPORTATION, WEST ST. PAUL, MN	CMRC	35,484	36,553	95.2	99.9
199	B&W CARTAGE CO., INC., TAYLOR, MI	CMGF	35,150	34,873	99.9	100.5
200	SCHNEIDER NATIONAL BULK CARRIERS, GREEN BAY, WI	CMBC	34,970	32,158	97.2	92.9

had the lowest OR–79.7. The previous year, the Lebanon, Pa.-based, regional LTL carrier's OR was 79.3.

The next best ORs were posted by Estes Express Lines, Richmond, Va., with an 87.5, and U.S. Xpress of Chattanooga, Tenn., with a 88.0

As the 100th ranked carrier on this year's list, U.S. Xpress made the *Top 100* for the first time.

Where *Top 100* data came from

Trucking data experts at Transportation Technical Services (TTS), Fredericksburg, Va., compiled the *Top 100* information exclusively for CCJ. The data is based on reports filed with the Interstate Commerce Commission by Class I and II carriers.

TTS, which is the sister company of the Central Analysis Bureau, New York City, maintains key information on 46,000 for-hire and private fleets. ❑

Big improvement in 1992's 1st quarter

The Top 100 carriers' revenues, earnings and traffic volume "increased substantially" in the first quarter of 1992–compared to the same period a year ago–according to the Interstate Commerce Commission.

The ICC attributes the increases to improvements in the U.S. economy.

Compared to the first quarter of 1991:

- total tons hauled were up 10.3%;
- aggregate operating revenues increased 9.8%;
- net operating income jumped 129.9%,
- and post-tax net income skyrocketed by 498.0%.

Profit comparison by type fleet average

	1991 OR	1990 OR	1991 Profit Margin	1990 Profit Margin
Less-than-truckload.....	95.5	95.3	2.67%	2.74%
Truckload.....	90.9	94.8	1.67%	2.04%
Tank Truck.....	94.4	94.5	2.43%	2.25%
Reefers.....	94.3	95.3	3.04%	1.76%
Car Haulers.....	100.3	100.3	-1.28%	-1.47%
Household Goods.....	98.6	99.2	0.27%	0.30%

Truckload carriers

Highest Revenue Per Mile	Rev./Mile
Missouri Nebraska Express, St. Joseph, Mo.	$2.84
Customized Transportation, Jacksonville, Fla.	$2.83
Ace Transportation, Lafayette, La.	$2.63

Highest Revenue Per Ton	Rev./Ton
Contract Freighters, Joplin, Mo.	$98.47
Ryder Distribution Services, Miami, Fla.	$98.37
Dart Transit, Eagan, Minn.	$94.92

Highest Interest as a % of Revenue	Percentage
U.S. Xpress, Chattanooga, Tenn.	6.58%
Customized Transportation, Jacksonville, Fla.	6.26%
Munson Transportation, Monmouth, Ill.	

Tank truck fleets

Highest Revenue Per Mile	Rev./Mile
Chemical Leaman Tank Lines, Exton, Pa.	$2.40
Matlack, Wilmington, Del.	$2.36
Koch Service, Wichita, Kan.	$1.91

Highest Revenue Per Ton	Rev./Ton
Montgomery Tank Lines, Plant City, Fla.	$59.69
Chemical Leaman Tank Lines, Exton, Pa.	$56.77
Matlack, Wilmington, Del.	$33.29

Highest Interest as a % of Revenue	Percentage
Montgomery Tank Lines, Plant City, Fla.	6.20%
Chemical Leaman Tank Lines; Exton, Pa.	2.45%
Matlack, Wilmington, Del.	2.20%

Less-than-truckload carriers

Highest No. of Tons Carried	Million Tons
Yellow Freight System, Overland, Kan.	8.5
Roadway Express, Akron, Oh.	7.2
Consolidated Freightways, Portland, Ore.	7.0

Highest Average Load	Tons
Northwest Transport Service, Commerce City, Colo.	16.8
Yellow Freight System, Overland Park, Kan.	15.0
Consolidated Freightways, Portland, Ore.	14.5

Lowest Linehaul Cost Per Mile	Cost/Mile
Averitt Express, Cookeville, Tenn.	72.7¢
Southeastern Freight Lines, Columbia, S.C.	80.9¢
Overnite Transportation, Richmond, Va.	84.8¢

Highest Average Length of Haul	Miles
Watkins Motor Lines, Lakeland, Fla.	1,546
Consolidated Freightways, Portland, Ore.	1,390
Northwest Transport Service, Commerce City, Colo.	1,334

Highest Total Mileage	Million Miles
Yellow Freight System, Overland Park, Kan.	679.4
Consolidated Freightways, Portland, Ore.	625.4
Roadway Express, Akron, Oh.	582.1

Most Intermodal Mileage	Million Miles
Roadway Express, Akron, Oh.	59.7
Consolidated Freightways, Portland, Ore.	42.2
Yellow Freight System, Overland Park, Kan.	40.9

Highest Revenue Per Mile	Rev./Mile
A-P-A Transport, North Bergen, N.J.	$9.97
New Penn Motor Express, Lebanon, Pa.	$7.32
TNT Red Star Express, Auburn, N.Y.	$6.71

Highest Insurance Cost as a % of Revenues	Percentage
TNT Holland Motor Express, Holland, Mich.	1.43%
United Parcel Service, Atlanta, Ga.	1.50%
Hyman Freightways, St. Paul, Minn.	1.65%

Highest Interest as a % of Total Expenses	Percentage
AAA Cooper Transportation, Dothan, Ala.	3.58%
Willig Freight Lines, San Francisco, Calif.	3.39%
Saia Motor Freight Line, Houma, La.	3.18%

Motor vehicle carriers

Highest Revenue Per Mile	Rev./Mile
M&G Convoy, Troy, Mich.	$2.94
Anchor Motor Freight, Birmingham, Mich.	$2.91
Commercial Carriers, Troy, Mich.	$2.62

Highest Revenue Per Ton	Rev./Ton
Complete Auto Transit, Troy, Mich.	$93.25
Anchor Motor Freight, Birmingham, Mich.	$82.61
Allied Systems, Decatur, Ga.	$79.51

Highest Insurance as a % of Revenue	Percentage
Complete Auto Transit, Troy, Mich.	2.98%
Commercial Carriers, Troy, Mich.	3.12%
Allied Systems, Decatur, Ga.	5.01%

Highest Interest as a % of Revenue	Percentage
Allied Systems, Decatur, Ga.	2.11%
Anchor Motor Freight, Birmingham, Mich.	1.45%
M&G Convoy, Troy, Mich.	0.66%

Reefer operations

Highest Revenue Per Mile	Rev./Mile
FFE Transportation Service, Dallas, Te	$1.63
Marten Transport, Mondovi, Wisc.	$1.12
KLLM Transport Services, Jackson, Miss.	$1.11

Highest Revenue Per Ton	Rev./Ton
C.R. England & Sons, Salt Lake City, Ut.	$101.21
FFE Transportation Service, Dallas, Tex.	$99.38
Midwest Coast Transport, Sioux Falls, S.D.	$88.58

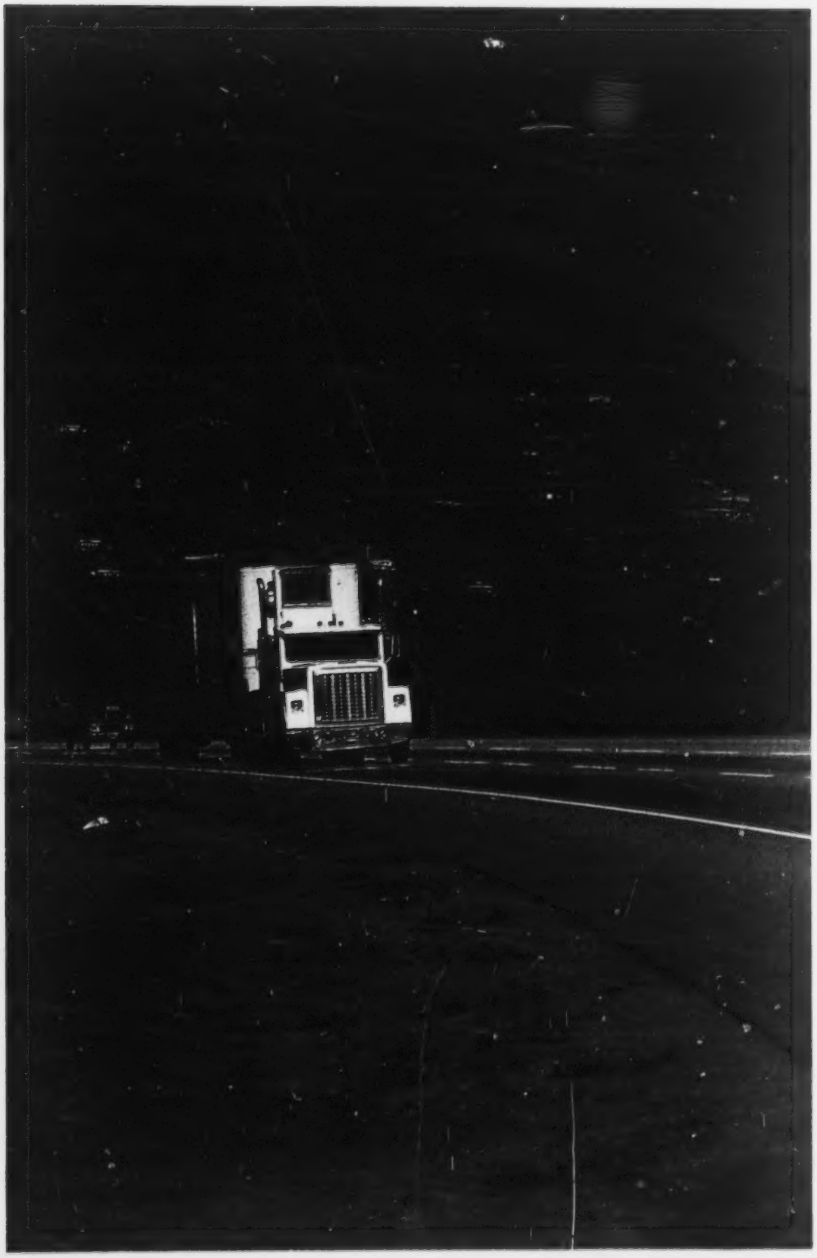
Highest Insurance as a % of Revenue	Percentage
C.R. England & Sons, Salt Lake City, Ut.	2.03%
Monfort Transportation, Greeley, Colo.	2.36%
National Carriers, Liberal, Kan.	2.63%

Highest Interest as a % of Revenue	Percentage
Freymiller Trucking, Bakersfield, Calif.	4.93%
Marten Transport, Mondovi, Wisc.	3.16%
KLLM Transport Services, Jackson, Miss.	3.12%

TOP 100 and Trends & Statistics are available in a booklet for $10. For a copy, or copies, write on company letterhead to: Carol Hope-Heavens, Reprint Editor, Commercial Carrier Journal, 1 Chilton Way, Radnor, Pa. 19089. Send prepaid check or money order.

1992 INDUSTRY TRENDS & STATISTICS

By **MATTHEW R. HOGAN,** *Market Research Editor, and* **JERRY STANDLEY,** *Editor-In-Chief*



There has been little to celebrate for the past few years about equipment sales to motor carriers. And 1991 was no different.

Last year did nothing to upset the declining sales pattern for truck equipment suppliers. Normally, in a presidential election year, business can count on an improving economy. And despite efforts of the Bush Administration to put some air into the flat U.S. economy, most forecasters are keeping their heads down about their projections for this year and next.

Caution appears to be the watchword. While most suppliers experienced buoyant sales activity in the second quarter this year, few have enough confidence in those sales levels to revise upward what were generally conservative business plans for 1992 put together late last year. Those plans called for 110,000 to 125,000 Class 8 units in 1992.

Engine makers would have you believe they are at the worst end of the equipment sales depression.

There is ample evidence to support that claim, provided by Henry Schacht, chairman and ceo, Cummins Engine Co., Columbus, Ind. He says trucking's current recession began in 1989. For the manufacturer, however, there has been no growth in the market for the past 20 years.

"We're operating at sales levels of 1970 today," says Schacht.

Text continues on page 84

This chart tracks six years of Class 1-8 domestic truck factory sales. Class 8, the sales bellweather, fell off in 1991 for the third consecutive year, dropping 21.6% (23,150 units). That follows a 16.3% (20,855 units) drop in 1990, and a 5.4% (7,249 units) decrease in 1989, the year the current economic recession began. That's a net loss of 51,254 unit sales in three years. The sales record is equally bad for Classes 6 and 7, off 33% and 10.2% respectively, also for the third year. As a group, Classes 6, 7, 8 are down 21.7% (44,373 units) in 1991.

The pressure took a toll on Scania U.S.A., announcing last month they will stop importing trucks from Sweden to the U.S. market, effective December 31, 1992. There are an estimated 700 Scania's on the road here. Officials says they will continue parts and service support through 17 dealers in the Northeastern states.

1991 trailer shipments (page 82) were down 15%. At the annual Truck Trailer Manufacturers Association meeting last April, Peter Toja, V.P. Economic Consulting and Planning Inc. of New York said 1992 trailer shipments should rebound 14% to 145,000 units. In 1993 we could see a return to a healthy sales year at 169,000 units. As always, van trailer shipments will lead any sales uptick. Look for construction type, bulk, and lowbed trailers to increase in production as the economy picks up steam in the months ahead.

DOMESTIC TRUCK FACTORY SALES BY GVW

	1991	1990	1989	1988	1987	1986
CLASS 1 (Up to 6,000 lb GVW)						
Total Sales	2,267,143	2,377,468	2,447,962	2,496,648	2,270,566	1,964,832
Diesel Sales	485	337	107	86	1,813	4,999
% Diesel	-	-	-	-	0.1%	0.3%
CLASS 2 (6,001-10,000 lb)						
Total Sales	594,435	848,690	1,057,067	1,020,515	976,803	927,462
Diesel Sales	76,739	94,030	88,636	79,535	85,125	96,443
% Diesel	12.9%	11.1%	8.4%	7.8%	8.7%	10.4%
CLASS 3 & 4 (10,001-16,000 lb)						
Total Sales	3,547	693	54	86	476	-
Diesel Sales	34	55	54	86	322	-
% Diesel	1.0%	7.9%	100.0%	100.0%	67.6%	-
CLASS 5 (16,001-19,500 lb)						
Total Sales	28	1,644	4,197	5,224	5,841	5,749
Diesel Sales	-	51	3,559	1,599	431	-
% Diesel	-	3.1%	84.8%	30.6%	7.4%	-
CLASS 6 (19,501-26,000 lb)						
Total Sales	10,915	16,288	16,327	29,332	17,092	17,846
Diesel Sales	7,122	11,458	10,475	17,429	9,184	9,265
% Diesel	65.2%	70.3%	64.2%	59.4%	53.7%	51.9%
CLASS 7 (26,001-33,000 lb)						
Total Sales	54,140	66,990	71,340	79,143	84,341	77,597
Diesel Sales	42,641	53,957	55,568	56,574	56,719	47,694
% Diesel	78.8%	80.5%	77.9%	71.5%	67.2%	61.5%
CLASS 8 (33,001 lb & heavier)						
Total Sales	83,875	107,025	127,880	135,129	121,425	103,216
Diesel Sales	83,872	107,002	127,826	134,981	121,192	102,671
% Diesel	100.0%	100.0%	100.0%	99.9%	99.8%	99.5%
TOTALS						
Total Sales	3,014,083	3,418,798	3,724,827	3,766,077	3,476,544	3,096,702
Diesel Sales	210,893	266,890	286,225	290,290	274,786	261,072
% Diesel	7.0%	7.8%	7.7%	7.7%	7.9%	8.4%

Source: Total Sales: MVMA Report FS-3 (FACTORY SALES - U.S. Domestic); Diesel Sales: MVMA Report FS-5 (Trucks With Diesel Engines - U.S. Domestic)

TRUCK FACTORY SALES (U.S. domestic only; excluding tactical military vehicles and school bus chassis)

GVW	Class 1 Up to 6000 lb		Class 2 6,001 - 10,000 lb		Class 3 10,001 - 14,000 lb		Class 4 14,001 - 16,000 lb		Class 5 16,001 - 19,500 lb		Class 6 19,501 - 26,000 lb	
SALES YEAR	90 sales	91 sales	90 sales	91 sales	90 sales	91 sales	90 sales	91 sales	90 sales	91 sales	90 sales	91 sales
Chevy	791,202	656,168	217,276	140,037	-	-	464	2,340	51	12	2,014	1,628
GMC	191,587	164,371	77,095	50,298	-	-	174	1,175	1,593	16	2,036	3,165
Oldsmobile	29,319	32,246	-	-	-	-	-	-	-	-	-	-
Pontiac	33,332	22,701	-	-	-	-	-	-	-	-	-	-
Chrysler	268,862	306,429	55,414	49,265	-	-	-	-	-	-	-	-
Ford	758,270	767,661	492,685	353,718	-	-	-	-	-	-	4,817	2,656
Freightliner	-	-	-	-	-	-	-	-	-	-	0	99
International	-	-	-	-	-	-	55	32	-	-	6,922	2,946
Jeep	131,003	127,697	6,220	1,117	-	-	-	-	-	-	-	-
Kenworth	-	-	-	-	-	-	-	-	-	-	-	-
Mack	-	-	-	-	-	-	-	-	-	-	-	-
Mercedes	-	-	-	-	-	-	-	-	-	-	499	421
Peterbilt	-	-	-	-	-	-	-	-	-	-	-	-
Volvo GM	-	-	-	-	-	-	-	-	-	-	-	-
Others	173,893	189,870	-	-	-	-	-	-	-	-	-	-
TOTAL	2,377,468	2,267,143	848,690	594,435	0	0	693	3,547	1,644	28	16,288	10,915

TRUCK RETAIL SALES (Data includes built-up and CKD units assembled in the U.S.)

GVW	Class 1 Up to 6000 lb		Class 2 6,001- 10,000 lb		Class 3 10,001- 14,000 lb		Class 4 14,001- 16,000 lb		Class 5 16,001- 19,500 lb		Class 6 19,501- 26,000 lb	
Sales Year	90 sales	91 sales	90 sales	91 sales	90 sales	91 sales	90 sales	91 sales	90 sales	91 sales	90 sales	91 sales
Chrysler	2,891	5,236	0	0	0	0	0	0	0	0	0	0
Dodge	349,079	328,800	109,018	109,374	7,856	10,595	0	0	0	0	0	0
Plymouth	171,527	173,373	0	0	0	0	0	0	0	0	0	0
Jeep	190,699	174,602	6,164	3,173	0	0	0	0	0	0	0	0
Total Chrysler	714,196	682,011	115,182	112,547	7,856	10,595	0	0	0	0	0	0
Ford	778,064	764,976	569,372	446,678	0	0	26,057	19,667	0	0	6,444	5,078
Freightliner	0	0	0	0	0	0	0	0	0	0	0	41
Chevrolet	933,192	832,026	309,032	233,768	678	747	103	1,806	247	126	8,944	2,730
GMC	221,675	200,701	103,390	83,264	1,280	1,459	25	999	1992	427	5,817	3,740
Oldsmobile	26,075	31,818	0	0	0	0	0	0	0	0	0	0
Pontiac	29,875	23,682	0	0	0	0	0	0	0	0	0	0
Total GM	1,210,817	1,088,227	103,390	317,032	1,958	2,206	128	2805	2239	553	14,761	6,470
Hino	0	0	0	0	309	192	0	87	516	410	660	546
Isuzu	0	0	0	0	6,624	5,800	685	1243	375	901	1,824	812
Iveco	0	0	0	0	1,613	0	525	0	240	0	160	0
Kenworth	0	0	0	0	0	0	0	0	0	0	0	0
Mack	0	0	0	0	0	0	0	0	0	0	1,051	504
Mazda	3,409	11,404	0	0	0	0	0	0	0	0	0	0
Mercedes-Benz	0	0	0	0	0	0	0	0	0	0	535	428
Mitsubishi Fuso	0	0	0	0	1,852	1,762	0	0	649	639	263	393
Navistar	0	0	0	0	0	0	58	27	115	26	11,943	7,623
Nissan	134,260	129,633	0	0	0	0	0	0	0	0	0	0
Nissan Diesel	0	0	0	0	661	701	0	0	921	772	534	550
Peterbilt	0	0	0	0	0	0	0	0	0	0	0	0
Scania	0	0	0	0	0	0	0	0	0	0	0	0
Subaru-Isuzu	21,626	42,996	0	0	0	0	0	0	0	0	0	0
Suzuki	3,365	3385	0	0	0	0	0	0	0	0	0	0
Toyota	0	1,002	0	0	0	0	0	0	0	0	0	0
VolvoGM Heavy	0	0	0	0	0	0	0	0	0	0	0	0
Western Star	0	0	0	0	0	0	0	0	0	0	34	0
Other Domestic	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	2,865,737	2,723,634	1,096,976	876,257	20,873	21,256	27,453	23,829	5,055	3,301	38,209	22,445

Source: MVMA U.S RETAIL SALES OF TRUCKS - RS-3S

Class 7 26,001 - 33,000 lb		Class 8 33,001+ lb		GRAND TOTAL		GVW
90 sales	91 sales	90 sales	91 sales	90 sales	91 sales	Sales Year
7,007	5,288	-	-	1,018,014	805,473	Chevy
13,677	11,493	12	16	286,174	230,534	GMC
-	-	-	-	29,319	32,246	Oldsmobile
-	-	-	-	33,332	22,701	Pontiac
-	-	-	-	324,276	355,694	Chrysler
24,316	17,400	12,358	7,757	1,292,446	1,149,192	Ford
-	393	21,626	20,644	21,626	21,136	Freightliner
20,995	17,507	19,766	15,855	47,738	36,340	International
-	-	-	-	137,223	128,814	Jeep
-	-	12,825	10,088	12,825	10,088	Kenworth
-	-	13,665	8,390	13,665	8,390	Mack
995	835	-	-	1,494	1,256	Mercedes
-	-	11,903	9,520	11,903	9,520	Peterbilt
-	1,224	14,247	11,209	14,247	12,433	VolvoGM
-	-	623	396	174,516	190,266	Others
66,990	54,140	107,025	83,875	3,418,798	3,014,083	TOTAL

Class 7 26,001- 33,000 lb		Class 8 33,001+ lb		GRAND TOTAL		GVW
90 sales	91 sales	90 sales	91 sales	90 sales	91 sales	Sales Year
0	0	0	0	2,891	5,236	Chrysler
0	0	0	0	465,953	448,769	Dodge
0	0	0	0	171,527	173,373	Plymouth
0	0	0	0	196,863	177,775	Jeep
0	0	0	0	837,234	805,153	Total Chrysler
26,465	18,451	13,103	8,479	1,419,505	1,263,329	Ford
0	210	23,032	22,617	23,032	22,868	Freightliner
7,278	5,912	0	0	1,259,474	1,077,115	Chevrolet
14,526	12,944	0	0	348,705	303,534	GMC
0	0	0	0	26,075	31,818	Oldsmobile
0	0	0	0	29,875	23,682	Pontiac
21,804	18,856	0	0	1,355,097	1,436,149	Total GM
943	680	0	0	2,428	1,915	Hino
572	242	0	0	10,080	8,998	Isuzu
0	0	0	0	2,538	0	Iveco
389	307	14,620	11,752	15,009	12,059	Kenworth
1,404	676	14,350	10,480	16,805	11,660	Mack
0	0	0	0	3,409	11,404	Mazda
1,105	901	0	0	1,640	1,329	Mercedes-Benz
559	333	0	0	3,323	3,127	Mitsubishi Fuso
30,422	30,050	27,800	22,824	70,338	60,550	Navistar
0	0	0	0	134,260	129,633	Nissan
493	374	0	0	2,609	2,397	Nissan Diesel
359	213	11,970	9,396	12,329	9,609	Peterbilt
0	0	103	50	103	50	Scania
0	0	0	0	21,626	42,996	Subaru-Isuzu
829	0	14,767	0	18,961	3,385	Suzuki
0	0	0	0	0	1,002	Toyota
0	1,305	935	12,113	935	13,418	VolvoGM Heavy
1	0	644	606	679	606	Western Star
0	0	0	413	0	413	Other Domestic
85,345	72,598	121,324	98,730	4,260,972	3,842,050	TOTAL

FACTORY VS. RETAIL SALES

U.S. domestic truck factory sales figures are reported by members of the Motor Vehicle Manufacturers Association. These are the traditional source for year-to-year comparisons of truck production and sales activity. While not every truck supplier in the U.S. is a member of the MVMA, all of the big ones are. Thus, factory sales figures are a reasonable measure of domestic truck production.

But, factory sales figures only illustrate the number of trucks produced from facilities on American soil. In 1990 that was only 80% of the commercial truck sales activity in America. There is more truth to be told about the vitality of the truck building business in America.

Truck retail sales figures, also published by the MVMA, provide the best picture of truck sales activity in the U.S. For instance, retail sales figures include the number of commercial trucks sold in the U.S. by European and Asian importers. Those do not show up in the MVMA's factory sales report. Neither do export sales from domestic producers, like Freightliner and Kenworth, two examples of domestic builders enjoying a robust export business.

Factory sales figures do not reflect commercial truck sales resulting from joint venture agreements between foreign and domestic suppliers, such as the Isuzu medium duty trucks distributed and sold under the GM nameplate.

So, focus on retail sales for the best perspective on truck sales activity in the U.S. commercial truck market.

TOP: These are 1990 and 1991 MVMA factory sales data from U.S. plants only. Data do not include sales of certain vehicles resulting from joint venture agreements between foreign and domestic suppliers. VolvoGM does not report separate sales figures for Class 8 Volvo, WhiteGMC and Autocar nameplates. Those figures are reported as one combined number. *Others includes Nissan, Marmon, Oshkosh.

BOTTOM: Retail sales figures give the most accurate picture of commercial truck sales in America. For particulars, see the "Factory vs. Retail Sales" section at the top of this page.

15 YEAR TRUCK FACTORY SALES BY GVW (1977 - 1991)

CLASS 1 6,000 lb & less	No. of Units 25,831,357	% of Total 55.77%
CLASS 2 6,001 - 10,000 lb	No. of Units 16,540,981	% of Total 35.71%
CLASS 3 10,001 - 14,00 lb	No. of Units 142,052	% of Total 0.31%
CLASS 4 14,001 - 16,000 lb	No. of Units 15,929	% of Total 0.03%
CLASS 5 16,001 - 19,500 lb	No. of Units 61,359	% of Total 0.13%
CLASS 6 9,501 - 26,000 lb	No. of Units 788,610	% of Total 1.70%
CLASS 7 26,001 - 33,000 lb	No. of Units 983,431	% of Total 2.12%
CLASS 8 33,001 lb & over	No. of Units 1,953,003	% of Total 4.22%
TOTAL	**46,316,722**	**100.00%**

Source: MVMA. These totals include 1977-1991 U.S. domestic and export factory sales, excluding tactical military vehicles and buses, for most truck manufacturers. R.L. Polk & Co. reports the total truck population to be 58,178,883 as of July 1, 1991. The Polk data include imported vehicles, school buses and private fleet buses, but not municpal buses. The number of school buses is known to be understated, Polk says, because of varying registration procedures among the states. For more details call the R.L. Polk Truck Group at 313-393-0880.

TRAILERS IN USE (15-year new trailer shipments 1977 - 1991)

	Number	% of Total
VANS		
Dry Freight/closed	1,205,584	49.6%
Dry Freight/open	56,505	2.3%
Insulated/semi-ins	319,336	13.1%
Drop Frame	74,279	3.1%
Livestock	21,446	0.9%
Total Vans	**1,677,150**	**69.0%**
SPECIAL TYPES		
Tanks, liquid	86,911	3.6%
Dry Bulk	25,707	1.1%
Pole, logging	22,160	0.9%
Platform	285,604	11.7%
Low-Bed	121,415	5.0%
Dump	114,412	4.7%
All Other	97,680	4.0%
Total Special	**753,889**	**31.0%**
TOTAL COMPLETE TRAILERS	**2,431,039**	**100.0%**
Detachable Trailers [1]	55,978	
Detachable Chassis [2]	296,896	
Dollies & Converter Gear [3]	60,304	
Total	**413,178**	
GRAND TOTAL	**2,844,217**	

Source: Industry Division, Bureau of Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.
1-Mostly container units. 2-Most used with containers. 3-Separate axle and fifth wheel assembly used to connect semi-trailers for double and triple trailers.

ABOVE: The useful life of a trailer can be stretched beyond 15 years depending on how one is used. This chart assumes a 15-year life because the majority of trailers older than that are in non-traditional use, such as storage trailers.
RIGHT: Trailer shipments declined an additional 15% last year compared to 1990. The only trailer segment that increased shipments was tank type, by 5.2%. Van trailers, which experienced a steep drop in 1990, declining 26,269 units, dropped half as much again in 1991, 13,800 units. Special type trailers continued their slide in 1991, almost 19%. The hardest hit groups were dry bulk and pole/logging trailers.
Note: The Dept. of Commerce continually revises its trailer data, which is the basis for this chart. These figures reflect the DOC revisions issued since July, 1991.

NEW TRAILER SHIPMENTS BY TYPE (1987-1991)

TYPE OF TRAILER	1991(p)	1990(r)	1989(r)	1988(r)	1987(r)
VANS					
Dry Freight/closed	66,641	72,771	94,027	96,390	99,054
Dry Freight/open	3,266	4,095	3,217	3,254	2,776
Insulated/semi-ins	17,232	21,401	24,887	24,862	26,650
Drop Frame	1,972	4,475	6,267	5,974	5,237
Livestock	983	1,152	1,765	1,511	1,663
Total Vans	**90,094**	**103,894**	**130,163**	**131,991**	**135,380**
SPECIAL TYPES					
Tanks, liquid	4,676	4,444	4,789	5,075	4,636
Dry Bulk	1,039	1,540	1,848	1,065	1,358
Pole, logging	306	861	780	710	832
Platform	11,323	13,479	18,411	17,648	14,975
Low-Bed	6,573	8,147	9,586	10,508	8,254
Dump	4,596	6,733	7,860	9,295	8,181
All Other	8,297	10,019	8,041	10,191	6,526
Total Special Types	**36,810**	**45,223**	**51,315**	**54,492**	**44,762**
TOTAL COMPLETE TRAILERS	**126,904**	**149,117**	**181,478**	**186,483**	**180,142**
Detachable Trailers [1]	-	-	-	5,223	438
Detachable Chassis [2]	[2]18,990	17,214	24,779	37,729	23,014
Dollies & Converter [4]	1,832	2,272	2,668	2,917	4,614
Total	**20,822**	**19,486**	**27,447**	**45,869**	**28,066**
GRAND TOTAL	**147,726**	**168,603**	**208,925**	**232,352**	**208,208**

Source: Industry Division, Bureau of Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.
P- Preliminary data. r-Revised data. 1- Mostly container units. 2- Figure combined with detachable trailers beginning 1989. 3- Primarily for use with containers. 4- Separate axle and 5th wheel assembly used for twin-trailer and triple-trailer combinations.

DIESEL ENGINES USED IN TRUCKS

(Factory sales from U.S. plants including exports)

Make	Year	Cat	Cummins	Detroit Diesel	Inter-national	Mack	Other	TOTAL
Chevy	1991	4,079	-	7,471	-	-	-	11,550
	1990	4,361	-	9,721	-	-	-	14,082
Ford	1991	2,125	3,470	482	44,011	-	19,287	69,375
	1990	4,194	6,116	48	58,773	-	27,157	96,288
Freightliner	1991	4,575	6,684	10,728	-	-	19	22,006
	1990	7,059	9,438	5,746	-	-	-	22,243
GMC	1991	8,706	194	4,025	-	-	1,572	14,497
	1990	11,372	344	5,265	-	-	3	16,984
Int'l	1991	1,185	9,681	1,759	29,711	-	-	42,336
	1990	1,113	15,126	-	38,694	-	-	54,933
Jeep	1990	-	-	-	-	-	3,804	3,804
	1990	-	-	-	-	-	0	
Kenworth	1991	2,582	4,639	3,833	-	-	-	11,054
	1990	5,752	5,117	2,684	-	-	-	13,553
Mack	1991	22	78	-	-	10,208	82	10,390
	1990	49	64	-	-	15,028	102	15,243
Mercedes	1991	-	-	-	-	-	1,293	1,293
	1990	-	-	-	-	-	1,610	1,610
Peterbilt	1991	5,458	2,337	2,511	-	-	-	10,306
	1990	7,589	3,359	1,853	-	-	-	12,801
Volvo GM	1991	2,949	5,651	3,968	-	-	1,411	13,979
	1990	2,902	8,707	3,585	-	-	572	15,766
All Other	1991	102	147	180	-	-	-	429
	1990	216	301	129	-	-	-	646
Total	1991	31,783	*32,881	34,957	73,722	10,208	27,468	211,019
	1990	44,607	48,572	29,031	97,467	15,028	29,444	264,149

LEFT: Reporting firms do not represent the entire industry. "Other" includes Isuzu, Mercedes-Benz, Scania-Vabis, Volvo and Ford. "All Other" includes Oshkosh and Marmon. *Not included are 27,465 Cummins engines in Chrysler vehicles.

There has been little to celebrate for years now among U.S. diesel engine makers. Things don't seem to be looking up any time soon, either. U.S. factory sales in 1991 dropped 20.1% on top of an 11.4% decline in 1990, and a 5% drop in 1989. The only upbeat note in the figures displayed in this chart is the renewed interest in Detroit Diesel, which suffered sharp declines in market share in recent years. While every engine maker's production declined in 1991, Detroit Diesel increased sales by 5,926 units. That's a 20.41% increase over the previous year. Detroit's market share moved up to 16.6%, in second place behind number one International's 34.9% share of the market.

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Fewer trucks are doing more work. Productivity improvements have been gained by motor carriers over the years in terms of vehicle size and weight regulations which allow progressively longer vehicle combinations and trailers with heavier payloads, and more efficient routing and dispatch schemes. Those gains have offset what otherwise would have created long term increases in equipment demand–diesel engines for example. The result of those gains is heavy commercial truck production today still averages 120,000 units annually, with 160,000 unit peaks, but 75,000 unit valleys.

Schacht says, engine makers have been forced to seek global partners to increase economy of scale, and pursue global markets to generate higher sales volumes. All of that to compete in a mature market that is not growing from the equipment supplier's point of view. At the same time, "there is an enormously disproportionate need for technological developments (such as those required to keep pace with the Environmental Protection Agency's tough heavy duty diesel emissions regulations)," Schacht says.

So, it's a challenge, even for world-class diesel engine makers, to meet emissions requirements, user demands and also to sustain R&D throughout the 90s. Cummins R&D spending in 1970 was $20 million. In 1980 it was $80 million. Last year it was $235 million.

The good news is, "The basic recipe for the diesel engine has settled down. We can meet diesel emissions requirements through the turn of the decade with current technology (CCJ Nov. '91, *1994 Diesels Revealed*)."

The year 2002 is when the next generation of emissions rulemaking will determine whether the diesel will continue to be the cost-effective power of choice, says Schacht.

Between now and then, "We must design the truck service systems of tomorrow." A priority is electronic engine maintenance. Only 5% of the Class 8 fleet is electronic, Schacht says, so the problem will only get bigger, made worse by the shortage of trained mechanics. Diagnostic tools and the compatibility of those tools among various engine makers' products is another problem. ❑

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